# NEWS SUMMARY

■ **AB Volvo in Sweden** has taken over the investigation of its U.S. unit's fraudulent "monster truck" advertising and has retained a New Jersey law firm to handle the probe. 1

■ **General Mills** will introduce Basic 4 and Triples cereals in January, supported by an estimated $50 million in introductory spending. 1

■ **Eastern Airlines** is again using Martin Shugrue in advertising in a final attempt to save the carrier from bankruptcy. 1

■ **ConAgra** is testing products to expand its top-selling Healthy Choice brand throughout the supermarket. 3

■ **Rupert Murdoch** is willing to sell some of his media properties, including *Seventeen* and *The Daily Racing Form*, to aid his debt restructuring plan. 3

■ **The Wall Street Journal,** *The National* and American Express Publishing Corp. announced personnel cutbacks last week, reflecting print media problems. 4

■ **A suit against DDB Needham** over the Chilko River rafting accident that killed five in 1987 has begun trial. 6

■ **Chrysler Corp.'s** estimated $40 million to $50 million cross-media marketing program with Time Warner will include 11 insert advertorials and single-advertiser issues of *Fortune*, *People* and *Life*. 16

■ **Sports Illustrated** Publisher Mark Mulvoy is cutting back on several projects and subscriber premium offers, and will instead stress the editorial vitality of the magazine. 16

■ **Nike** has hired a minority agency, Muse Cordero Chen. 16

■ **Gerber is switching** to a regional marketing strategy to shore up the soft spots in its 71.5% national share of the baby food market. 21

■ **Woman's Day** says it will invest $10 million in marketing efforts over the next 12 to 18 months and is testing a lower cover price. 24

■ **Evaluation of media** is taking new forms, speakers at the Audit Bureau of Circulations convention said. 25

■ **Retailer advertising** is slowing. 64.8% of retailers in a survey said fourth-quarter advertising as a percentage of sales would be even or down from last year. 28

■ **In-store media,** including vendor-controlled devices, are gaining more acceptance from retailers. 46

■ **Telemedia** is attracting advertiser interest, but the 900 number industry has some image problems, said speakers at the Tele-Media '90 conference. 50

■ **A "sound-alike" suit** brought by singer Mitch Ryder against Molson Breweries over a TV spot was dismissed in federal court in Detroit. 51

■ **Joel Hochberg** moves to president of domestic marketing at 20th Century Fox Film Corp. Succeeding him as president of DDB Needham, Chicago, is Susan Gillette. 52

■ **Quaker Oats Co.** says it will raise worldwide marketing investment 10% to 15% during the 1990 fiscal year. 57

## DEPARTMENTS


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# Volvo loss worsens tailspin at Scali

**By Gary Levin**

NEW YORK—The Volvo commercial-rigging incident has cast a long shadow over an already troubled agency.

Executives at Scali, McCabe, Sloves, which last week resigned the $40 million Volvo Cars of North America account under pressure after a public outcry, say the loss of its largest and oldest account merely caps what's already been a "horrible" year.

Just two days after the Volvo loss, amid more inquiries into modifications of cars used in a "monster truck" advertising campaign, Scali learned the creative portion of its largest single Canadian prize—Labatt Brewing Co.'s $15 million to $20 million Labatt's Blue beer account—would move to J. Walter Thompson Co., Toronto.

The account had been in review for the second time in two years. HYP&N, Toronto, a media buying company 50%-owned by Labatt, earlier pulled media buying from Scali's Toronto office, which continues to handle French-language Blue advertising and several smaller brands.

Post-Volvo, the agency's estimated billings have dropped 37% to $200 million from $318 million at the end of 1989. Volvo was Scali's first account when the agency opened in 1967.

Scali executives last week were concerned about getting their side of the Volvo story out but seemed reluctant to do so because of possible lawsuits among Scali, Volvo and the production house involved, Perretti Productions, New York, and Federal Trade Commission action.

Agency Chairman-CEO Marvin Sloves said he would refrain from "finger pointing" pending a separate investigation by Scali's law firm, Paul Weiss Rifkind Wharton & Garrison.

"One thing I'd like to see is getting our reputation scrubbed clean and putting ourselves in line for another car account," said Vice Chairman Bob Levenson. "There's been a shadow over our credibility."

There's also been a shadow over its business. Scali's flagship office has lost more than $115 million in

*(Continued on Page 54)*

# McD's takes low-fat lead

**By Scott Hume**

McDonald's Corp. last week upped the ante in fast-food's competition to remove the most fat and calories from its menus.

Rivals aren't folding their hands, however, and are expected to bring more lower-fat foods onto their menus. One of the first could be PepsiCo's Kentucky Fried Chicken Corp. Restaurant industry sources say KFC hopes to take national in January the Light 'n Crispy chicken that's 45% lower in fat than Extra Crispy chicken.

McDonald's disclosed last week that it's testing a 91% fat-free hamburger patty in 45 Harrisburg, Pa., area outlets. The quarter-pound burger is served on a sesame seed bun with ketchup, mustard, pickle, onion, lettuce and tomato under the name McDonald's Lean Deluxe.

The new sandwich contains 10 grams of fat, compared with 20.7 grams in its Quarter Pounder, 29.2 in its Quarter Pounder With Cheese, 32.4 in the Big Mac and 36.8 in the McD.L.T.

McDonald's Lean Deluxe also undercuts rival Wendy's International's claim to the lowest-fat fast-food burger with its 15-gram quarter-pound Single.

Hardee's Food Systems in May began testing an 18-gram hamburger it calls the Lean 1, a sandwich it hopes to introduce systemwide by yearend.

**McDonald's takes the lead in the race to reduce fat in fast-food with the 91% fat-free Lean Deluxe sandwich.**

The low-fat ground beef in McDonald's Lean Deluxe was developed through research into the mixture of burger ingredients at Auburn University. The three-year project was funded by the Beef Industry Council of the Meat Board.

McDonald's, which provided the project some input on fast-food cooking methods, is the first chain to test the product, but other chains are expected to be given access to it in the future if it tests well.

McDonald's Lean Deluxe is testing at $1.79 and $1.84, about the same as its regular Quarter Pounder. There will be media advertising for the product, which went into stores Nov. 5, but only point-of-purchase ads have been used so far, a McDonald's spokeswoman said. National agency Leo Burnett USA, Chicago, has the assignment.

In July, McDonald's, Burger King Corp. and Wendy's all announced they were switching to 100% vegetable oil for all frying. Hardee's made the switch earlier this year.

Kentucky Fried Chicken is testing grilled chicken in three markets and Light 'n Crispy chicken in five. A company spokesman wouldn't comment on reports it intends to roll out Light 'n Crispy in the first quarter of '91.

Burger King and Wendy's also have rolled out grilled chicken sandwiches that contain less fat than fried chicken; McDonald's has begun testing a similar product.

Nutrition crusader Phil Sokolof said he believed his ad campaign last spring (AA, April 9, *et seq.*) "helped the general public become aware that McDonald's and the others are fat factories.

"Since then, McDonald's has made important changes like switching to vegetable oil," he said. "I'm elated this [lower-fat hamburger] has come about." □

# Nestle eyes brand moves

**By Judann Dagnoli**

The creation of Nestle USA will lead to a reorganization of the Swiss giant's U.S. businesses along distribution lines and could cause some ad agency brand shifts.

Nestle USA effectively merges Carnation Co. with Nestle Enterprises to form a company with $7 billion in annual sales. Carnation and Nestle Enterprises, which includes Nestle Foods Corp. and Stouffer Foods Corp., had previously reported to parent Nestle SA separately.

Nestle hasn't said where it will base the new unit, but agency sources believe it will be in the new Carnation office in Glendale, Calif.

**T. Crull**

The formation of Nestle USA, effective Jan. 1, is part of a plan begun more than a year ago, when some products in similar categories were combined. Carnation's and Nestle Foods' frozen novelty lines went into Nestle Ice Cream Co. and Hills Bros. and Nescafe coffees merged into Nestle/Hills Coffee Co.

But the newly formed Nestle USA also offers additional synergies to further realign brands, agency sources say. One possibility, a source said, is merging Contadina Fresh pasta and sauces, now under Carnation Co., with FreshNes, a refrigerated line managed out of Stouffer.

Contadina Fresh is with McCann-Erickson Worldwide, Los Angeles; FreshNes is handled Jordan, McGrath, Case & Taylor, New York. Spending on Contadina Fresh was $7 million last

*(Continued on Page 56)*

Group's spending up 13.1% for first half of '90 in *Ad Age* regular report tracking media spending

# THE TOP 200 BRANDS

# AT&T pushes past McDonald's

By R. Craig Endicott

Like a multitude of voices pulsating through optical fibers, ad spending during the first half of 1990 raced from AT&T through the nation's media channels at volumes exceeding all other brands.

In supplanting McDonald's Corp. as the nation's top brand, AT&T Co. plunked down $253 million in advertising during the period, $70.1 million on long distance service (up 73.5%) and $25 million on the Universal Card launched at the start of the second quarter, according to *Advertising Age*'s report on the "Top 200 Brands."

AT&T ad expenditures jumped 52.8% from the prior-year period, and continued at the heady pace set in this year's first quarter. As the leading brand for the first quarter, its ad spending was $103.8 million, up 25.8% from first-quarter 1989.

The Top 200 brands are derived each quarter from nine-media composites provided by LNA/Arbitron Multi-Media Service. A "brand" is every product or service marketed under the same name regardless of industry class. This report compares the first six-month periods of 1990 and 1989.

As a group, the Top 200—ranging in spending levels from AT&T to Whirlpool appliances' No. 200 ranking at $14.4 million—captured 38.3% of all national media spending. This was up from 35.4% for the year-ago six-month period. The group also claimed 62% of all spending on network TV in the period, up from 57% in 1989, and comprised 31% of all spot TV expenditures, up from 29.6%.

Brands showing the biggest ad growth from 1989 to 1990 include Chrysler cars & trucks (as opposed to the parent's Plymouth and Eagle nameplates), which moved from No. 27 a year ago to No. 11 in first-half 1990 as the LeBaron and New Yorker in particular helped pushed brand spending to $85.5 million, up 51%.

Miller Beer, ranked No. 12, rose from No. 26 a year ago as spending leaped 40.1%, to $82.8 million. It outspent rival Budweiser beer, which slipped from No. 11 a year ago to No. 16 on media advertising of $79.3 million, down 6.7%.

While Budweiser's national media spending total is down, its overall advertising is up, notes parent Anheuser-Busch Cos. The brewer is diverting national media funds into local media not tracked by LNA/Arbitron.

Touchstone films and video, a Walt Disney Co. unit, rode heavy advertising for its 1990 blockbuster hits "Pretty Woman" and "Dick Tracy" to No. 26 among the Top 200 brands from No. 62 a year ago, when "Dead Poets Society" was its hit attraction.

Ultra Slim-Fast, the weight-reducing brand, leaped from No. 194 a year ago to No. 39 as Thompson Medical Co. fattened its ad spending to $46.9 million, up from only $6.4 million a year ago. Likewise, Nutri/System Weight Loss Centers advanced from No. 164 to No. 97 on an increase of 86.1% in advertising to $25.4 million.

Lexus, Toyota Motor Corp.'s upscale nameplate that hit the market in the summer of 1989, recorded $39.9 million in advertising to rank No. 52. Its competitor, Nissan Motor Co.'s Infiniti, spent $16.4 million in the first half 1990, compared to little advertising in 1989, to rank No. 172.

The nation's largest advertiser in 1989, Philip Morris Cos., is well on its way to a repeat performance in 1990. Eleven of the top 200 brands were from its stable, paced by No. 7 Kraft, which represented 27% of the $458.8 million PM spent on the 11 brands that made the ranking, a total that grew 13.6%.

Procter & Gamble, the nation's second-biggest advertiser, contributed 10 brands to the ranking; they amassed $229.2 million in advertising led by No. 50 Folgers coffees at $40.3 million.

PM may have had five brands above that position but P&G's brands demonstrated much stronger ad growth—up a collective 35.2%.

Bigness doesn't necessarily mean growth. General Motors' seven nameplates on the chart dropped 4.7% in total media advertising to $423.4 million.

Intense competition from the Japanese and sluggish car sales forced GM and other car marketers to divert marketing dollars to cash rebates, which often averaged more than $1,000 per car.

Advertising from the 200's voluminous automotive category, representing just over a fifth of its composite, grew by 6.4% compared with a 3% ad growth for the industry as a whole.

Spending for the Top 200 grew by 13.1% over the first half of 1989, while national media advertising for all other brands (LNA/Arbitron monitors 39,000 brands) dropped slightly during the period, an indication advertisers are thinking recession.

Even the Top 200, with their double-digit growth, can't mask a certain uneasiness about the economy:

- Two-quarter composites disguise a slippage in the second quarter for the Top 200. After an advance of 15.6% in the first quarter over the prior year, second-quarter ad volume dipped to a 10.9% gain from the prior year.
- Among media increments, consumer magazines dropped from an 0.6% decline in the first quarter to an 8.7% decline in the second, compared with prior-year results. Quarterly spending movement on network TV dipped from a 26% gain by the Top 200 in the first quarter to a more realistic 13% gain in the second.

On the upside, newspapers and network radio showed positive swings in quarterly movement, the former abetted by growth in automotive, airline, financial services and telephone services categories. Radio growth was aided largely by an infusion of advertising from telephone services.

- Among the 39,000 brands tracked by LNA/Arbitron that fell into the business and consumer services category (banks, S&Ls, credit cards), spending dropped 0.7% in the second quarter compared to the same period in 1989, the automotive/automotive accessories and equipment category spending rose only 1% in the second quarter from the prior year. These two categories represent 16% of U.S. media spending in the second quarter.
- If there isn't an economic slump nationwide, at least Detroit is poised for one.

Twenty-nine auto nameplates had collective ad growth of 6.4% for the first half to bring total automotive category ad volume to $1.59 billion. But of the total, the 15 Ford Motor Co., General Motors Corp. and Chrysler Corp. nameplates accounted for spending of $865.4 million, down 4.7% from their first-half contribution in 1989. Foreign-based auto marketers claimed $722.4 million for 14 nameplates, up 23.5%.

The Ford cars & trucks brand, ranked No. 5 overall, led auto marketers with $176.4 million in first-half advertising for a narrow 0.1% growth from year ago six-month figures. Toyota cars & trucks brand, No. 6 at $126.7 million, is accelerating at a much faster ad clip, though. The brand blew past Chevrolet, last year's No. 6, on the basis of a 29.5% first-quarter ad growth and a 32.4% second-quarter boost compared with prior-year periods.

Chevy, like Ford, is budgeting less media spending each quarter on a year-to-year basis. Its first-quarter total dropped 29.5% from prior year levels and the second fell 33.5%.

For the two half-year periods, auto advertising by the Top 200 declined 15% in magazines and 8% in spot TV.

Countering the notion that the wolf is at the door, however, was the relatively strong performance by the Top 200's retail (non-food) category. It grew 10.8% in the first half, well ahead of the 6% growth (to $2.65 billion) for all retail advertising in the first half.

Most retail spending growth was in network TV and magazines. The category's newspaper outlays—its biggest outlet by volume—advanced only 1.1%.

The Top 200's telephone services category left all others in its wake, however, surging 42.8% from the prior half-year to $337.2 million. The category has become overheated, not only by ad volume but by comparative campaigns and accusations that AT&T in particular is surreptitiously spiriting away customers from its competitors.

In the category, US Sprint grew 42% to $40.2 million, GTE telephone services advanced 37.4% to $14.9 million while MCI Communications watched from the sidelines, spending $28.6 million, down 8%. ☐

## Top 10 categories among top 200 brands

| Rank | Category | Measured ad spending 1990 | 1989 | % chg | First half 1990 spending by media Print | Broadcast | Outdoor | Number of brands |
|---|---|---|---|---|---|---|---|---|
| 1 | Automotive | $1,587.7 | $1,492.8 | 6.4 | $412.3 | $1,170.6 | $4.8 | 29 |
| 2 | Food | 860.4 | 752.3 | 14.4 | 69.2 | 790.3 | 0.9 | 21 |
| 3 | Retail (non-food) | 767.9 | 693.0 | 10.8 | 434.7 | 332.9 | 0.3 | 18 |
| 4 | Restaurants | 601.8 | 544.5 | 10.5 | 6.8 | 589.5 | 5.5 | 10 |
| 5 | Entertainment, media | 545.7 | 439.0 | 24.3 | 203.2 | 339.4 | 3.1 | 17 |
| 6 | Beverages, coffee | 343.0 | 311.9 | 10.0 | 17.2 | 323.5 | 2.3 | 9 |
| 7 | Telephone | 337.2 | 236.1 | 42.8 | 70.5 | 266.5 | 0.2 | 4 |
| 8 | Toiletries, cosmetics | 317.6 | 281.1 | 13.0 | 110.7 | 206.9 | 0.0 | 14 |
| 9 | Airlines | 299.3 | 268.0 | 11.7 | 175.2 | 120.9 | 3.2 | 9 |
| 10 | Financial services | 219.2 | 199.4 | 9.9 | 75.9 | 142.9 | 0.4 | 7 |

Notes: Dollars are in millions. Totals include only brands from within the top 200 for first half 1990. Source: LNA/Arbitron Multi-Media Service

## Top 10 parent companies of brands in top 200

| Rank | Company | Measured ad spending in first half 1990 | 1989 | % chg | First half 1990 spending by media Print | Broadcast | Outdoor | Number of brands |
|---|---|---|---|---|---|---|---|---|
| 1 | Philip Morris Cos. | $458.8 | $403.7 | 13.6 | $85.5 | $346.7 | $26.6 | 11 |
| 2 | General Motors Corp. | 423.4 | 444.3 | (4.7) | 85.9 | 335.8 | 1.7 | 7 |
| 3 | Sears, Roebuck & Co. | 274.6 | 223.1 | 23.1 | 75.5 | 198.7 | 0.4 | 3 |
| 4 | AT&T Co. | 253.5 | 165.9 | 52.8 | 56.7 | 196.6 | 0.2 | 1 |
| 5 | PepsiCo Inc. | 251.4 | 208.0 | 20.9 | 7.1 | 242.4 | 1.8 | 5 |
| 6 | Procter & Gamble Co. | 229.2 | 169.5 | 35.2 | 37.5 | 191.7 | 0.0 | 10 |
| 7 | Chrysler Corp. | 221.1 | 219.4 | 0.8 | 60.0 | 160.7 | 0.4 | 5 |
| 8 | Ford Motor Co. | 220.8 | 243.2 | (9.2) | 78.8 | 141.0 | 1.0 | 3 |
| 9 | McDonald's Corp. | 217.2 | 204.2 | 6.4 | 3.1 | 211.5 | 2.6 | 1 |
| 10 | Kellogg Co. | 205.5 | 197.7 | 4.0 | 4.2 | 201.3 | 0.0 | 1 |

Notes: Dollars are in millions. Totals include only brands from within the top 200. Source: LNA/Arbitron Multi-Media Service

## Measured ad spending by media for 200 brands

| Rank | Media | First half spending: top 200 brands 1990 | 1989 | % chg | All measured brands 1990 | 1989 | % chg |
|---|---|---|---|---|---|---|---|
| 1 | Network TV | $3,213.3 | $2,684.4 | 19.7 | $5,177.2 | $4,678.6 | 10.7 |
| 2 | Spot TV | 1,392.5 | 1,261.8 | 10.4 | 4,370.0 | 4,256.7 | 2.7 |
| 3 | Magazine | 968.9 | 1,017.2 | (4.8) | 3,242.0 | 3,201.0 | 1.3 |
| 4 | Newspaper | 911.3 | 860.5 | 5.9 | 4,257.5 | 4,300.7 | (1.0) |
| 5 | Syndicated TV | 407.3 | 250.6 | 62.5 | 726.4 | 570.6 | 27.3 |
| 6 | Cable TV Networks | 215.8 | 167.4 | 28.9 | 528.5 | 460.2 | 14.8 |
| 7 | Network radio | 156.2 | 149.6 | 4.4 | 368.1 | 310.9 | 18.4 |
| 8 | Sunday magazine | 81.2 | 94.1 | (13.7) | 362.2 | 355.1 | 2.0 |
| 9 | Outdoor | 68.2 | 68.9 | (1.0) | 309.1 | 357.2 | (13.5) |
| | Subtotal print media | 1,961.4 | 1,971.8 | (0.5) | 7,861.7 | 7,856.7 | 0.1 |
| | Subtotal broadcast media | 5,385.1 | 4,513.7 | 19.3 | 11,170.0 | 10,277.0 | 8.7 |
| | Total | 7,414.7 | 6,554.4 | 13.1 | 19,340.7 | 18,490.9 | 4.6 |

Notes: Dollars are in millions. Source: LNA/Arbitron Multi-Media Service. AA chart: Kevin Brown

# Top 200 mega-brands by first-half ad spending

| Rank '90 | Rank '89 | Brand, product, service & parent company | Total measured ad spending 1990 | 1989 | % chg |
|---|---|---|---|---|---|
| 1 | 5 | **AT&T Co.**, AT&T Co. | $253,459.7 | $165,911.2 | 52.8 |
| 2 | 1 | **McDonald's restaurants**, McDonald's Corp. | 217,202.0 | 204,203.0 | 6.4 |
| 3 | 3 | **Sears stores**, Sears, Roebuck & Co. | 212,729.7 | 183,567.3 | 15.9 |
| 4 | 2 | **Kellogg breakfast foods**, Kellogg Co. | 205,549.5 | 197,701.8 | 4.0 |
| 5 | 4 | **Ford cars & trucks**, Ford Motor Co. | 176,400.4 | 176,250.0 | 0.1 |
| 6 | 7 | **Toyota cars & trucks**, Toyota Motor Corp. | 126,708.0 | 96,694.8 | 31.0 |
| 7 | 10 | **Kraft foods**, Philip Morris Cos. | 125,162.3 | 87,714.5 | 42.7 |
| 8 | 6 | **Chevrolet cars**, General Motors Corp. | 124,054.2 | 154,725.8 | (19.8) |
| 9 | 9 | **Nissan cars & trucks**, Nissan Motor Co. | 115,323.9 | 89,797.9 | 28.4 |
| 10 | 14 | **Pepsi beverages**, PepsiCo | 85,605.0 | 71,110.1 | 20.4 |
| 11 | 27 | **Chrysler cars & trucks**, Chrysler Corp. | 85,452.8 | 56,576.8 | 51.0 |
| 12 | 26 | **Miller beer**, Philip Morris Cos. | 82,840.6 | 59,109.0 | 40.1 |
| 13 | 13 | **Burger King restaurants**, Grand Metropolitan | 82,286.2 | 77,766.4 | 5.8 |
| 14 | 8 | **American Express**, American Express Co. | 80,769.1 | 95,532.4 | (15.5) |
| 15 | 23 | **Mazda cars & trucks**, Mazda Motor Co. | 80,336.6 | 60,752.9 | 32.2 |
| 16 | 11 | **Budweiser beer**, Anheuser-Busch Cos. | 79,294.4 | 84,976.4 | (6.7) |
| 17 | 19 | **K mart stores**, K mart Corp. | 78,578.0 | 62,943.9 | 24.8 |
| 18 | 16 | **Coca-Cola beverages**, Coca-Cola Co. | 76,968.7 | 70,650.3 | 8.9 |
| 19 | 18 | **Honda cars, motorcycles & equipment**, Honda Motor Co. | 74,265.8 | 66,531.8 | 11.6 |
| 20 | 40 | **General Motors cars & trucks**, General Motors Corp. | 70,177.7 | 43,981.8 | 59.6 |
| 21 | 15 | **Macy's stores**, R.H. Macy & Co. | 64,052.8 | 70,967.1 | (9.7) |
| 22 | 33 | **American Airlines passenger**, AMR Corp. | 63,256.1 | 50,203.0 | 26.0 |
| 23 | 17 | **Oldsmobile cars**, General Motors Corp. | 59,959.6 | 66,671.6 | (10.1) |
| 24 | 12 | **Dodge cars & trucks**, Chrysler Corp. | 59,263.6 | 78,872.4 | (24.9) |
| 25 | 22 | **Buick cars**, General Motors Corp. | 58,358.4 | 61,617.0 | (5.3) |
| 26 | 62 | **Touchstone films & video**, Walt Disney Co. | 58,146.8 | 32,149.6 | 80.9 |
| 27 | 21 | **Penney's stores**, J.C. Penney Co. | 57,755.1 | 62,189.8 | (7.1) |
| 28 | 28 | **Kentucky Fried Chicken restaurants**, PepsiCo | 57,204.6 | 55,515.9 | 3.0 |
| 29 | 37 | **Disney entertainment**, Walt Disney Co. | 56,479.6 | 47,407.8 | 19.1 |
| 30 | 47 | **Universal City Studios**, MCA Inc. | 56,417.5 | 38,775.0 | 45.5 |
| 31 | 41 | **Tylenol pain reliever**, Johnson & Johnson | 56,073.4 | 42,818.6 | 31.0 |
| 32 | 25 | **Pontiac cars & trucks**, General Motors Corp. | 55,963.2 | 59,771.0 | (6.4) |
| 33 | 44 | **Nabisco foods**, RJR Nabisco | 53,173.6 | 39,394.5 | 35.0 |
| 34 | 20 | **Kent cereals**, Philip Morris Cos. | 52,478.4 | 62,547.9 | (16.1) |
| 35 | 36 | **Pizza Hut restaurants**, PepsiCo | 51,841.6 | 47,503.5 | 9.1 |
| 36 | 35 | **Coors beer**, Adolph Coors Co. | 50,196.2 | 48,509.5 | 3.5 |
| 37 | 30 | **Wrigley's gums**, Wm. Wrigley Jr. Co. | 49,086.0 | 52,516.9 | (6.5) |
| 38 | 51 | **United Airlines**, UAL Corp. | 47,302.5 | 36,694.1 | 28.9 |
| 39 | 194 | **Ultra Slim-Fast**, Thompson Medical Co. | 46,912.6 | 6,432.3 | 629.3 |
| 40 | 45 | **Delta Air Lines**, Delta Air Lines | 46,220.6 | 39,309.0 | 17.6 |
| 41 | 31 | **Warner Bros. movies & video**, Time Warner | 44,843.8 | 50,979.3 | (12.0) |
| 42 | 55 | **Mercedes-Benz cars**, Daimler-Benz AG | 44,025.9 | 34,524.8 | 27.5 |
| 43 | 49 | **Maxwell House coffees**, Philip Morris Cos. | 43,858.7 | 37,028.7 | 18.4 |
| 44 | 29 | **Marlboro cigarettes**, Philip Morris Cos. | 43,606.0 | 54,398.9 | (19.8) |
| 45 | 72 | **Volkswagen cars & trucks**, Volkswagen AG | 43,522.5 | 28,732.5 | 51.5 |
| 46 | 53 | **Montgomery Ward stores**, Montgomery Ward & Co. | 43,130.4 | 35,762.0 | 20.6 |
| 47 | 56 | **Paramount movies & video**, Paramount Communications | 42,796.0 | 34,518.8 | 24.0 |
| 48 | 32 | **Columbia Pictures movies & records**, Sony Corp. | 42,541.6 | 50,505.1 | (15.8) |
| 49 | 39 | **Wendy's restaurants**, Wendy's International | 41,500.9 | 44,290.2 | (6.3) |
| 50 | 54 | **Folgers coffees**, Procter & Gamble Co. | 40,327.6 | 34,624.0 | 16.5 |
| 51 | 74 | **US Sprint**, United Telecommunications | 40,247.9 | 28,340.0 | 42.0 |
| 52 | 199 | **Lexus cars**, Toyota Motor Corp. | 39,900.1 | 985.5 | 3,948.7 |
| 53 | 64 | **Cheerios cereal**, General Mills | 39,618.4 | 31,685.3 | 25.0 |
| 54 | 79 | **Stouffer foods & hotels**, Nestle SA | 39,381.3 | 27,514.9 | 43.1 |
| 55 | 100 | **Tide laundry products**, Procter & Gamble Co. | 38,971.6 | 23,528.6 | 65.6 |
| 56 | 43 | **Du Pont products**, Du Pont Co. | 38,894.0 | 39,688.2 | (2.0) |
| 57 | 66 | **Domino's Pizza**, Domino's Pizza | 38,667.4 | 31,137.1 | 24.2 |
| 58 | 24 | **Subaru cars**, Fuji Heavy Industries | 38,095.0 | 60,703.7 | (37.2) |
| 59 | 57 | **Hallmark gifts & toys**, Hallmark Cards | 38,087.4 | 34,324.1 | 11.0 |
| 60 | 110 | **Allstate insurance**, Sears, Roebuck & Co. | 37,774.7 | 21,502.2 | 75.7 |
| 61 | 58 | **Circuit City stereo stores**, Circuit City Stores | 37,180.9 | 33,661.9 | 10.5 |
| 62 | 86 | **Taco Bell restaurants**, PepsiCo | 37,051.2 | 25,878.0 | 43.2 |
| 63 | 59 | **Prudential insurance**, Prudential Ins. Co. of America | 36,778.7 | 33,465.9 | 9.9 |
| 64 | 101 | **L'Oreal cosmetics**, Nestle SA | 36,325.4 | 23,420.1 | 55.1 |
| 65 | 73 | **Time-Life books & video**, Time Warner | 36,057.4 | 28,651.9 | 25.8 |
| 66 | 48 | **Acura cars**, Honda Motor Co. | 36,028.7 | 38,302.7 | (5.9) |
| 67 | 42 | **Citibank**, Citibank | 35,967.5 | 40,457.7 | (11.1) |
| 68 | 127 | **Nike shoes & sportswear**, Nike Inc. | 35,945.6 | 18,739.0 | 91.8 |
| 69 | 71 | **Goodyear tires**, Goodyear Tire & Rubber Co. | 35,863.9 | 29,966.0 | 19.7 |
| 70 | 50 | **Mitsubishi cars & trucks**, Mitsubishi Motors Corp. | 33,643.0 | 37,028.2 | (9.1) |
| 71 | 61 | **Weight Watchers**, H.J. Heinz Co. | 32,962.0 | 32,338.7 | 1.9 |
| 72 | 112 | **Gillette shaving products**, Gillette Co. | 32,671.6 | 21,343.6 | 53.1 |
| 73 | 113 | **Advil & CoAdvil**, American Home Products Corp. | 32,056.6 | 21,320.6 | 50.4 |
| 74 | 65 | **Jeep vehicles**, Chrysler Corp. | 31,701.8 | 31,307.5 | 1.3 |
| 75 | 69 | **Clairol toiletries**, Bristol-Myers Squibb Co. | 31,294.6 | 30,480.5 | 2.7 |
| 76 | 80 | **May Co. stores**, May Department Stores Co. | 30,948.3 | 27,282.8 | 13.4 |
| 77 | 84 | **Red Lobster restaurants**, General Mills | 30,425.9 | 26,495.7 | 14.8 |
| 78 | 88 | **Highland Stores**, Highland Superstores | 30,228.2 | 25,616.8 | 18.0 |
| 79 | 85 | **BMW cars**, BMW AG | 29,743.4 | 26,001.8 | 14.4 |
| 80 | 106 | **Cover Girl cosmetics**, Procter & Gamble Co. | 29,470.4 | 22,148.0 | 33.1 |
| 81 | 81 | **Cadillac cars**, General Motors Corp. | 29,374.7 | 27,009.0 | 8.8 |
| 82 | 103 | **Northwest Airlines**, NWA Inc. | 28,572.0 | 23,155.6 | 23.4 |
| 83 | 67 | **MCI Communications**, MCI Communications Corp. | 28,568.0 | 31,037.6 | (8.0) |
| 84 | 93 | **Broadway Department Stores**, Carter Hawley Hale Stores | 28,074.8 | 24,875.0 | 12.9 |
| 85 | 168 | **Tri-Star Pictures**, Sony Corp. | 27,787.9 | 13,034.4 | 113.2 |
| 86 | 75 | **Pan Am airlines**, Pan American World Airways | 27,372.2 | 27,705.3 | (1.2) |
| 87 | 38 | **Franklin Mint**, Franklin Mint | 26,994.8 | 44,564.6 | (39.4) |
| 88 | 83 | **General Electric**, General Electric Co. | 26,935.8 | 26,977.4 | (0.2) |
| 89 | 82 | **United Parcel air freight**, United Parcel Service | 26,825.0 | 26,999.3 | (0.6) |
| 90 | 117 | **Hershey's foods**, Hershey Foods Corp. | 26,793.2 | 20,503.6 | 30.7 |
| 91 | 46 | **Kodak photographic products**, Eastman Kodak Co. | 26,777.4 | 38,887.7 | (31.1) |
| 92 | 91 | **Midas Muffler shops**, Whitman Corp. | 26,737.8 | 25,276.5 | 5.8 |
| 93 | 97 | **Campbell's soups**, Campbell Soup Co. | 26,713.1 | 23,698.2 | 12.7 |
| 94 | 177 | **Little Caesar Pizza**, Little Caesar Enterprises | 26,383.9 | 11,514.9 | 129.1 |
| 95 | 87 | **Eastern Airlines**, Continental Airlines Holdings | 25,783.7 | 25,707.2 | 0.3 |
| 96 | 68 | **Geo cars & trucks**, General Motors Corp. | 25,533.7 | 30,494.3 | (16.3) |
| 97 | 164 | **Nutri/System Weight Loss Centers**, Nutri/System Inc. | 25,369.1 | 13,632.6 | 86.1 |
| 98 | 99 | **True Value stores**, Cotter & Co. | 25,366.8 | 23,653.8 | 7.2 |
| 99 | 78 | **Newport cigarettes**, Loews Corp. | 24,952.5 | 27,539.6 | (9.4) |
| 100 | 102 | **Isuzu cars & trucks**, Isuzu Ltd. | 24,841.5 | 23,239.2 | 6.9 |
| 101 | 115 | **Orion Pictures**, Orion Pictures Corp. | $24,555.1 | $21,072.2 | 16.5 |
| 102 | 90 | **TWA airlines**, Trans World Airlines | 24,499.8 | 25,285.2 | (3.1) |
| 103 | 60 | **Plymouth cars & trucks**, Chrysler Corp. | 24,409.3 | 32,673.4 | (25.3) |
| 104 | 131 | **Discover credit card service**, Sears, Roebuck & Co. | 24,113.1 | 18,026.7 | 33.8 |
| 105 | 149 | **Revlon cosmetics**, Revlon Group | 23,948.5 | 15,803.4 | 51.5 |
| 106 | 181 | **Fidelity financial services**, Fidelity Management & Research Co. | 23,707.6 | 11,113.3 | 113.3 |
| 107 | 125 | **Jell-O gelatins & puddings**, Philip Morris Cos. | 23,661.0 | 19,410.8 | 21.9 |
| 108 | 89 | **Nestle foods**, Nestle SA | 23,433.9 | 25,381.1 | (7.7) |
| 109 | 34 | **Mercury cars**, Ford Motor Co. | 23,366.2 | 50,007.1 | (53.3) |
| 110 | 119 | **Lucky food stores**, American Stores Co. | 23,122.0 | 20,085.5 | 15.1 |
| 111 | 166 | **HBO cable TV**, Time Warner | 22,880.6 | 13,583.5 | 68.4 |
| 112 | 121 | **Keebler foods**, United Biscuits (Holdings) | 22,727.1 | 19,759.6 | 15.0 |
| 113 | 122 | **Lysol cleaners**, Eastman Kodak Co. | 22,580.8 | 19,749.6 | 14.3 |
| 114 | 94 | **7UP beverages**, Dr Pepper/Seven Up Cos. | 22,452.1 | 24,116.5 | (6.9) |
| 115 | 105 | **Canon cameras & electronics**, Canon Inc. | 22,425.6 | 22,258.4 | 0.8 |
| 116 | 111 | **Vaseline products**, Unilever NV | 22,384.2 | 21,370.2 | 4.7 |
| 117 | 171 | **Royal Caribbean cruises**, Royal Caribbean Cruise Line | 22,216.2 | 12,257.3 | 81.2 |
| 118 | 107 | **CBS TV network**, CBS Inc. | 21,726.5 | 22,139.7 | (1.9) |
| 119 | 104 | **Maybelline cosmetics**, Wasserstein Perella & Partners | 21,335.5 | 22,692.2 | (6.0) |
| 120 | 123 | **20th Century-Fox movies**, News Corp. | 21,080.3 | 19,723.0 | 6.9 |
| 121 | 138 | **Lincoln cars**, Ford Motor Co. | 21,037.9 | 16,897.3 | 24.5 |
| 122 | 170 | **Pearle Visions Centers**, Grand Metropolitan | 21,017.1 | 12,693.7 | 65.6 |
| 123 | 176 | **Visa credit cards**, Visa International | 20,971.4 | 11,560.3 | 81.4 |
| 124 | 154 | **Virginia Slims cigarettes**, Philip Morris Cos. | 20,854.1 | 14,912.1 | 39.8 |
| 125 | 124 | **Kroger food stores**, Kroger Co. | 20,622.9 | 19,646.3 | 5.0 |
| 126 | 63 | **Continental Airlines**, Continental Airlines Holdings | 20,387.3 | 32,126.0 | (36.5) |
| 127 | 95 | **Tropicana juices**, Seagram Co. | 20,331.3 | 24,083.7 | (15.6) |
| 128 | 120 | **Eagle cars**, Chrysler Corp. | 20,306.2 | 19,924.2 | 1.9 |
| 129 | 162 | **Quaker foods**, Quaker Oats Co. | 20,143.9 | 13,794.1 | 46.0 |
| 130 | 139 | **Wal-Mart stores**, Wal-Mart Stores | 20,031.7 | 16,851.0 | 18.9 |
| 131 | 165 | **Ocean Spray drinks & sauces**, Ocean Spray Cranberries | 19,668.6 | 13,609.0 | 44.5 |
| 132 | 189 | **Frito snacks**, PepsiCo | 19,651.4 | 7,951.8 | 147.1 |
| 133 | 108 | **Audi cars**, Volkswagen AG | 19,501.5 | 21,663.9 | (10.0) |
| 134 | 133 | **Alka-Seltzer remedies**, Bayer AG | 19,442.7 | 17,570.6 | 10.7 |
| 135 | 188 | **Ivory soap & cleaners**, Procter & Gamble Co. | 19,366.8 | 8,298.2 | 133.4 |
| 136 | 118 | **Hardee's restaurants**, Imasco Ltd. | 19,263.7 | 20,151.4 | (4.4) |
| 137 | 135 | **Radio Shack electronics store**, Tandy Corp. | 19,121.7 | 17,281.0 | 10.7 |
| 138 | 92 | **Total cereal**, General Mills | 19,068.8 | 24,976.1 | (23.7) |
| 139 | 187 | **Sports Illustrated magazine**, Time Warner | 18,967.7 | 8,916.3 | 112.7 |
| 140 | 150 | **Dr Pepper beverages**, Dr Pepper/Seven Up Cos. | 18,854.9 | 15,757.8 | 19.7 |
| 141 | 140 | **Century 21 real estate**, Metropolitan Life Insurance Co. | 18,796.5 | 16,737.3 | 12.3 |
| 142 | 128 | **Crest toothpaste**, Procter & Gamble Co. | 18,739.7 | 18,626.3 | 0.6 |
| 143 | 77 | **Johnson household products**, S.C. Johnson & Son | 18,699.0 | 27,657.0 | (32.4) |
| 144 | 137 | **State Farm insurance**, State Farm Insurance of America | 18,686.4 | 17,141.2 | 9.0 |
| 145 | 142 | **Kleenex paper products**, Kimberly-Clark Corp. | 18,551.7 | 16,492.6 | 12.5 |
| 146 | 157 | **ABC TV network**, Capital Cities/ABC | 18,504.9 | 14,550.3 | 27.2 |
| 147 | 130 | **Safeway food stores**, Safeway Stores | 18,361.4 | 18,336.0 | 0.1 |
| 148 | 163 | **Head & Shoulders hair products**, Procter & Gamble Co. | 18,249.0 | 13,720.5 | 33.0 |
| 149 | 70 | **Merit cigarettes**, Philip Morris Cos. | 18,215.5 | 30,411.2 | (40.1) |
| 150 | 114 | **CBS video**, Sony Corp. | 18,058.1 | 21,218.2 | (14.9) |
| 151 | 143 | **Lens Crafters opticians stores**, U.S. Shoe Corp. | 18,014.5 | 16,458.5 | 9.5 |
| 152 | 129 | **NBC TV network**, General Electric Co. | 17,993.7 | 18,505.5 | (2.8) |
| 153 | 146 | **MasterCard credit card services**, MasterCard International | 17,948.6 | 16,047.8 | 11.8 |
| 154 | 126 | **Mennen toiletries**, Mennen Co. | 17,832.3 | 19,269.9 | (7.5) |
| 155 | 151 | **General Foods coffees & corporate**, Philip Morris Cos. | 17,789.6 | 15,509.0 | 14.7 |
| 156 | 173 | **Benadryl allergy relief**, Warner-Lambert Co. | 17,688.0 | 12,071.3 | 46.5 |
| 157 | 153 | **Giant Food Stores**, Ahold International | 17,655.2 | 15,391.0 | 14.7 |
| 158 | 174 | **Apple computers**, Apple Computer | 17,455.3 | 11,724.0 | 48.9 |
| 159 | 144 | **Vons markets**, Vons Cos. | 17,260.6 | 16,315.8 | 5.8 |
| 160 | 141 | **Walgreen drugstores**, Walgreen Co. | 17,258.5 | 16,627.2 | 3.8 |
| 161 | 179 | **Betty Crocker foods**, General Mills | 17,094.9 | 11,363.9 | 50.4 |
| 162 | 190 | **Norelco shavers**, Philips NV | 17,091.0 | 7,933.2 | 115.4 |
| 163 | 167 | **Excedrin pain relievers**, Bristol-Myers Squibb Co. | 17,082.2 | 13,184.6 | 29.6 |
| 164 | 155 | **Mervyns**, Dayton Hudson Corp. | 16,982.0 | 14,903.4 | 13.9 |
| 165 | 175 | **Levi's sportswear**, Levi Strauss & Co. | 16,963.7 | 11,617.6 | 46.0 |
| 166 | 96 | **Oil of Olay creams & lotions**, Procter & Gamble Co. | 16,963.6 | 23,711.2 | (28.5) |
| 167 | 197 | **New Line Cinema movies**, New Line Cinema Corp. | 16,867.6 | 3,299.7 | 411.2 |
| 168 | 196 | **Cheer laundry detergent**, Procter & Gamble Co. | 16,789.1 | 3,862.5 | 334.7 |
| 169 | 109 | **Colgate toothpaste & toothbrushes**, Colgate-Palmolive Co. | 16,711.4 | 21,656.6 | (22.8) |
| 170 | 160 | **Target stores**, Dayton Hudson Corp. | 16,705.6 | 13,956.3 | 19.7 |
| 171 | 193 | **Nintendo games**, Nintendo Co. | 16,693.6 | 6,604.5 | 152.8 |
| 172 | 198 | **Infiniti cars**, Nissan Motor Co. | 16,434.5 | 1,103.8 | 1,388.9 |
| 173 | 156 | **Estee Lauder cosmetics**, Estee Lauder Inc. | 16,400.6 | 14,655.7 | 11.9 |
| 174 | 147 | **Mattel toys**, Mattel Inc. | 16,380.3 | 15,934.1 | 2.8 |
| 175 | 132 | **Clorox cleaners**, Clorox Co. | 16,240.4 | 17,779.9 | (8.7) |
| 176 | 134 | **Holiday Inn hotels**, Bass PLC | 16,159.5 | 17,503.9 | (7.7) |
| 177 | 136 | **Bloomingdale's**, Campeau Corp. | 16,157.0 | 17,170.2 | (5.9) |
| 178 | NA | **Motrin IB pain reliever**, Upjohn Co. | 16,067.8 | 0.0 | NA |
| 179 | 52 | **IBM computers**, IBM Corp. | 15,924.4 | 35,925.9 | (55.7) |
| 180 | 191 | **US Air**, USAir Group | 15,897.4 | 7,804.7 | 103.7 |
| 181 | 192 | **Dreyfus financial**, Dreyfus Corp. | 15,753.8 | 6,695.8 | 135.3 |
| 182 | 169 | **Oscar Mayer foods**, Philip Morris Cos. | 15,614.8 | 12,992.8 | 20.2 |
| 183 | 148 | **Heinz condiments**, H.J. Heinz Co. | 15,566.8 | 15,883.7 | (2.0) |
| 184 | 98 | **U.S. Postal Service**, U.S. Government | 15,488.2 | 23,675.3 | (34.6) |
| 185 | 178 | **Lord & Taylor stores**, May Department Stores Co. | 15,482.3 | 11,380.7 | 36.0 |
| 186 | 180 | **Nyquil cold products**, Procter & Gamble Co. | 15,450.8 | 11,196.5 | 38.0 |
| 187 | 183 | **Marriott hotels**, Marriott Corp. | 15,289.2 | 10,064.2 | 51.9 |
| 188 | 172 | **Neutrogena toiletries**, Neutrogena Corp. | 15,233.8 | 12,158.5 | 25.3 |
| 189 | 159 | **Avis car rental**, Avis Inc. | 15,176.3 | 14,335.2 | 5.9 |
| 190 | 76 | **Purina pet foods**, Ralston Purina Co. | 15,086.1 | 27,675.7 | (45.5) |
| 191 | 182 | **GTE telephone**, GTE Corp. | 14,905.8 | 10,850.3 | 37.4 |
| 192 | 116 | **Minute Maid beverages**, Coca-Cola Co. | 14,892.4 | 20,877.1 | (28.7) |
| 193 | 185 | **Luvs diapers**, Procter & Gamble Co. | 14,887.1 | 9,813.2 | 51.7 |
| 194 | 186 | **Louis Rich meats**, Philip Morris Cos. | 14,734.3 | 9,707.7 | 51.8 |
| 195 | 161 | **Surf detergents**, Unilever NV | 14,692.9 | 13,878.1 | 5.9 |
| 196 | 195 | **Blockbuster videos**, Blockbuster Entertainment Corp. | 14,649.8 | 4,801.5 | 205.1 |
| 197 | 158 | **Polaroid cameras & accessories**, Polaroid Corp. | 14,553.7 | 14,421.9 | 0.9 |
| 198 | 145 | **Hertz Rent-A-Car**, Park Ridge Corp. | 14,491.6 | 16,155.9 | (10.3) |
| 199 | 152 | **Upjohn Co.**, Upjohn Co. | 14,467.1 | 15,395.0 | (6.0) |
| 200 | 184 | **Whirlpool appliances**, Whirlpool Corp. | 14,456.4 | 9,897.7 | 46.1 |

**Notes**: Dollars are in thousands. Measured media spending includes magazine, Sunday magazine, newspaper, network, spot and syndicated TV, cable TV networks, and network radio. **Source**: LNA/Arbitron Multi-Media Service. See story on Page 27

**AA chart**: Kevin Brown

# LETTERS

### In defense of L.A. Gear

When I left a large public relations firm to start my own agency, one of my first clients was Sandy Saemann and L.A. Gear.

I resent the implication that Mr. Saemann is a difficult client and L.A. Gear doesn't hold agencies in high regard (AA, Nov. 5). My own relationship with the company has been characterized by communication and respect for nearly two years.

Mr. Saemann has proven he can run a successful company—L.A. Gear is the fastest growing major athletic shoe company, growing at a 40% rate in a terrible retail climate. To expect him to turn over the [creative] reins in one fell swoop is naive.

When L.A. Gear attempts to hold a "confidential" agency search and a significant number of the participants run to the advertising press to tell them the news; when agencies complain about producing four commercials by year's end; and when agencies compare L.A. Gear to Gallo, maybe then the advertising community can begin to understand L.A. Gear's frustration with the way many agencies run their businesses.

**Howard Bragman**
Bragman & Co.
Beverly Hills, Calif.

### Pioneering in Moscow

Not to take away from the credit *Ad Age* deserves for its important two-day advertising/marketing seminar in Moscow, but that was not the first. There was also no "old Soviet taboo against advertising," nor did "perestroika reforms make this seminar possible." Far from "unprecendented," there were several, much-earlier, such seminars.

In 1968, George Gribbin (then ceo of Young & Rubicam), Alexander Brody (then head of international of Y&R) and I (then VP-special planning at Y&R) went to the Soviet Union.

(How our plane was diverted to Leningrad in a blinding snowstorm and how we managed to get to Moscow with no rubles on an overnight train with no sleeping accomodations is another story.)

In Moscow we addressed a seminar of about 60 people from Vneshtogreklama (the agency for advertising Soviet products outside the country), in the course of which we defined and discussed marketing, did slide presentations of several case histories, showed TV commercials and answered questions from a fascinated audience for an hour.

We are invited back in 1969 for more ambitious seminars. The climax was a seminar attended by about 500 people from all the advertising agencies, various ministries and journalism. . . . To say we were well-received is an understatement. We were greeted with long, enthusiastic applause. The question-and-answer session could have gone on for days but had to be cut short after an hour. We were treated as honored guests, stuffed with more food than we could eat and plied with vodka—and brandy at breakfast—which we learned how to gracefully refuse so we could continue on a vertical course.

Y&R's motive was to open an office in Moscow and use it not only for clients but to teach modern advertising to the Soviet adpeople. Many years later (can it be 21 years since we were there?) a Moscow Y&R office is a reality.

**Virginia Miles**
Englewood, N.J.

### 'Financial World' responds

I do not understand why Robert Paradise of *Barron's* incorrectly nitpicks a sales program that could save an advertiser $600,000 by running in *Barron's* and *Financial World* compared with *Forbes'* rates, and could put substantial dollars in *Barron's* pockets. Mr. Paradise (Letters, AA, Oct. 22) seems to completely misunderstand the essence of the *FW/Barron's* joint sale.

First, his protest that we are somehow brokering space for *Barron's* is a misrepresentation of both the *Advertising Age* story (AA, Oct. 8) and our program, which is simply a joint sale in which both *FW* and *Barron's* receive separate insertion orders.

His contention that his audience is more upscale than ours is also unusual given that, according to Simmons, only 21% of *Barron's* audience is managerial/administrative versus 31% for *FW*; and 20% of *Barron's* audience is not employed versus 14% for *FW*. I hope *FW's* audience never becomes so upscale.

Finally on the point of CPMs, at $58, *Barron's* has one of the highest in the business field, while *FW's* is $40.

**Douglas A. McIntyre**
President, *Financial World*
New York

### Somebody wasn't listening

As a former employee of D'Arcy MacManus & Masius, pre-merger, I am guilty of referring to my alma mater as D'Arcy. However, after reading retired D'Arcy Masius Benton & Bowles Chairman John Bowen's fervent plea to discontinue using this incorrect reference ("Don't call us D'Arcy," Forum, AA, Oct. 29), I took an oath that from now on I would refer to the agency as DMB&B. I admit, I was also afraid of retribution from Mr. Bowen at some time during my life.

Apparently, though, your editors aren't quite as fearful, as evidenced by the article, "Ad message is crucial" on Page 52 of the same issue. I spotted not one but three references to "D'Arcy" in an article about a brand-leader study presented at the ANA meeting by, yes, Mr. Bowen. Oops! John Bowen certainly got his crucial message across, but somebody wasn't listening.

**Annette Snyder**
Account exec
Ross Roy Communications
Bloomfield Hills, Mich.

*Address letters to* Advertising Age, *Viewpoint Editor, 220 E. 42nd St., New York 10017.*

## FREEZE FRAME

Bob Schochet

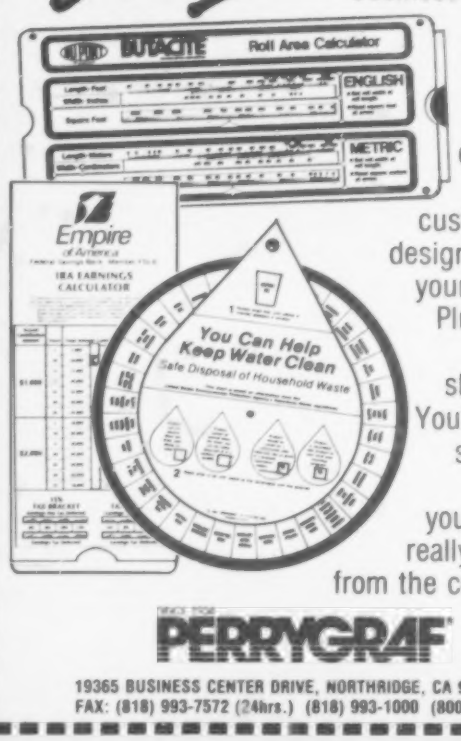
**"You'd better tell them what they want to know or they'll use the Epilady on you."**

## CORRECTIONS & CLARIFICATIONS

■ Due to a typographical error, the figure for *PC Magazine's* 1989 single-copy sales was incorrect in a chart titled "Shopper hot on the racks" (AA, Nov. 12, P. S-15). It should read 127,491.

■ Jerry Ward, former publisher of *Traditional Home*, was named a group VP-publishing director at Meredith Corp. and will be in charge of the company's Special Interest Publications, Craftways titles and *Golf for Women*. The new title was incorrectly given (AA, Oct. 29, P. 8).

■ Andy Hayes, a VP at the Tribune Co., made comments incorrectly attributed to Andy McKenna, a Tribune Co. director, in a story on the New York *Daily News* (AA, Nov. 5, P. 67). □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## Garfield mislabeled Wisk

Bob Garfield in a recent column (AA, Oct. 22) says Lever Bros. is attempting to exploit the recent wave of environmental concern with advertising that points out that Wisk Power Scoop creates less waste than conventional detergents. Bob has the right to his opinion . . . but I would challenge his implication—that because Lever has not, at one blow, completely eliminated all the environmental effects of detergent use, the positive step they have taken is somehow unworthy of mention.

The basis of Wisk's environmental statements is that it is the most concentrated detergent in the U.S. This in itself reduces waste along with the significant additional benefit of requiring a cardboard box only one-third the size of conventional detergents. Incidentally, every Wisk box is made of recycled cardboard and every single scoop and handle is coded for recycling.

No one, least of all Lever Bros., is claiming this is more than a small step. But should a company be criticized for taking constructive action? Bob's complaint is that "the difference between large and small detergent boxes" is too minor to mention. Consider that we are talking about 75 million boxes. Add to that the hundreds of millions of concentrate boxes that will be sold by other detergent manufacturers. Together, these millions of little steps should add up to something quite significant indeed.

Bob writes that Lever is hailing itself as the Rachel Carson of package goods, when in fact the advertising copy—"It may not change the world, but it's a start"—could hardly be more modest. And the overwhelming number of consumers Lever showed it to liked it, believed it and considered it meaningful.

What I regret most about Bob's article is not that it criticizes Lever, but that it shows that the commercial didn't communicate to him the company's genuine concern for environmental issues. My solace is that so far, at least, American consumers are not confused about what Lever is saying about Wisk Power Scoop. Even better, they have shown a strong interest in trying this new product. Isn't that how advertising is supposed to work?

**Burt Manning**
Chairman-CEO
J. Walter Thompson Co.
New York

## Second

*(Continued from Page 30)*

of Pacific Rim companies.

Third, and perhaps most worrisome, this way of doing business gets absorbed into our national psyche. Rather than being a can-do nation we become an almost-can-do nation. Gradually, we come to accept the Second Time Syndrome as the way things are done. It is no wonder we get clobbered so often in the marketplace.

So what's to be done? Simple: Make First Time Performance a corporate value. Companies need to value a consumer's time as much as they value a consumer's pocketbook. How? The usual easy-to-say, hard-to-do way: Top management identifies it as a goal, incentives are set up to reward achievement and programs are encouraged to develop creative ways to meet First Time objectives. Of course, companies don't have to develop programs to deal with this now. There's always a second chance, isn't there? □

# GLOBAL MARKETING & MEDIA

## Unilever, P&G, Nestle hold onto top spots

### Anglo-Dutch giant spends $1.1 billion

**By Nancy Giges**

Unilever, Procter & Gamble Co. and Nestle held onto their respective slots as the three biggest advertisers outside the U.S. for the third consecutive year.

In *Advertising Age's* fourth survey of the 50 leading ad spenders outside the U.S., the Anglo-Dutch conglomerate kept its top ranking, doling out $1.1 billion in 25 countries in 1989.

However, in comparing spending to the previous year in countries where *Ad Age* has comparable data for both years, Unilever's spending declined 5.1%.

Cincinnati-based P&G spent $934 million in 18 countries outside the U.S., while Vevey, Switzerland-based Nestle chalked up $534.6 million in 19 nations.

Rounding out the top 10 are: Renault, Paris; Philip Morris Cos., New York; Fiat, Turin, Italy; Matsushita Electric Industrial Co., Osaka, Japan; PSA Peugeot-Citroen, Paris; Nissan Motor Co., Tokyo; and Volkswagen, Wolfsburg, Germany *(see chart on Page S-4)*.

When U.S. ad spending is included, consumer goods giant P&G comes out on top with worldwide spending of $2.7 billion.

Philip Morris follows closely with $2.5 billion. Unilever and General Motors Corp., Detroit, tie for third with $1.7 billion each. The only other company exceeding the $1 billion mark in ad spending worldwide is Nestle with $1.1 billion.

Spending for the top 50 totaled $13.7 billion, up 10.5% from 1988 figures.

Newcomers to the top 50 list include Mazda Motor Corp., Hiroshima, Japan; Sony Corp., Tokyo; Ajinomoto Co., Tokyo; Shiseido Co., Tokyo; Mitsukoshi, Tokyo; Tokyo Electric Power, Tokyo; Matsushita Kogyo, Yokohama; Suzuki Motor Co., Hamamatsu, Japan; Seiyu, Tokyo; and Standa, Rome.

Dropping from the list are the British Government, London; BMW, Munich; Barilla, Parma, Italy; Gervais Danone, Levallois-Perret, France; RJR Nabisco, New York; Jacobs Suchard, Zurich; B.A.T Industries, London; British Telecom, London; Kingfisher, London; and Cole Myer, Sydney. Suchard, acquired by Philip Morris, is included in its parent's totals.

The number of Japan-based companies rose to 29, up from 20, while the U.S. number dropped to 10 from 11. Italy was represented by three, the Netherlands by 2½, Germany and France by two each, Switzerland by one and the U.K. by one-half. The split is the result of Unilever, which claims roots in the U.K. and the Netherlands.

Automakers top the list with 12 entries contributing $3.6 billion; followed by food companies with nine, contributing $2.3 billion; electronics companies with eight, contributing $2 billion; and soap marketers with six, at $3 billion.

On the list are six retailers, four beer companies and two utilities. Computer, photography and cosmetic marketers have one company each on the list.

Information for *Ad Age's* ranking of the top 50 spenders in non-U.S. advertising was compiled from data supplied from 38 major advertiser markets by *Ad Age's* international network and sources around the world *(see "How to read these rankings" on Page S-10)*. □

## Top circulation gains found in weeklies

### AT&T, Canon among top advertisers

**By R. Craig Endicott**

Global weeklies, backed by their growing popularity in Europe and Asia/Pacific, led monthlies and dailies in average 1990 circulation growth, while dailies proved most cost-efficient for advertisers, holding down cost per thousand growth.

According to *Advertising Age's* sixth annual Global Marketing & Media survey covering 18 publications, weeklies were paced in circulation by the U.K.'s *The Economist*, with overall growth of 11.7% to 425,366.

Among all weeklies, Europe contributed 5.6% average growth, and Asia/Pacific 7.2%, as the category registered 3.2% average circulation growth overall compared with 2.3% for dailies.

AT&T Co. and Canon were the marketers named most frequently—five times each—as a top 10 advertiser by the 18 publishers. Luxury goods were listed 26 times as a top 10 advertiser. Automobiles at 23 and airlines and financial services at 22 each followed.

Dailies, with an average CPM growth of 4%, increased efficiencies more than the weeklies, whose average CPM growth was 10.3%. Paris-based *International Herald Tribune* paced the dailies with 1.2%. Contributing to the *Tribune's* cost-efficiency was a strong 4.1% circulation growth compared with a low 5.4% increase in a b&w full-page ad to $41,300.

Monthlies registered average CPM growth of 7%, a number distorted by *WorldPaper's* CPM uptick of 22.3%. *WorldPaper* also lost 18.2% in circulation to effect an average circulation decline of 2.8% for the group. Apart from this newspaper-distributed publication, monthlies' average circulation increase hit 1.1% and average CPM growth was 3.1%.

*Reader's Digest* dwarfed not only all monthlies but all publications in volume terms with circulation of 28.8 million, up 1.3%, and overall CPM of $9.47, up 3.8%.

North American editions dominated in circulation volume, with 44.9 million for all publications. Average circulation growth of 4.9% was held back by *Newsweek* and *Time*, with circulation declines of 1.9% and 2.9%, respectively. Those two, however, helped stimulate average circulation growth in the Asia/Pacific corridor, where all publications grew an average 7%.

Circulation growth was mixed in Latin America and Africa/Middle East. *WorldPaper*, with a worldwide circulation decline to 913,100, dropped 36.7% in Latin America from the demise of its 230,000-circulation Mexican edition. Its Mideast circulation also dropped 65.5%.

A large part of the average circulation growth of 4.7% in Europe is coming from new business in Central European markets. From the Soviet Union, *Business Week* drew 50,000 and *WorldPaper* 270,000.

This study includes global publications that are circulated on at least three continents, draw close to 10% of worldwide circulation from international editions and have centralized ad buying. □

# Advertising Age's 1990 global media lineup

| | Title/ publisher/ headquarters | Paid North American circulation/ % chg | Paid foreign circulation by region/ % chg | Worldwide circulation/ % chg | b&w pg cost/ % chg/ 4/c pg cost in 1990 | b&w pg cost/ 4/c pg cost projected for 1991 | Global cpm b&w pg in 1990/ % chg | Top worldwide advertisers in 1990 |
|---|---|---|---|---|---|---|---|---|
| Dailies | ***Financial Times of London***<br>Financial Times Ltd.<br>London | 23,870<br>15.9 | **Europe:** 257,420 (0.2)<br>**Middle East/Africa:** 3,619 7.4<br>**Asia/Pacific:** 4,838 27.3<br>**Latin America:** 420 39.1<br>**Caribbean:** 321 (8.3) | 290,488<br>1.6 | $41,664<br>12.0<br>$84,680 | NA<br>NA | $143.43<br>10.3 | **British Airways**<br>**British Gas**<br>**Toshiba**<br>**Daimler-Benz**<br>**Renault** |
| | ***International Herald Tribune***<br>New York Times & Washington Post<br>Neuilly, France | 5,303<br>11.5 | **Europe:** 136,489 2.4<br>**Middle East/Africa:** 6,715 (1.4)<br>**Asia/Pacific:** 38,330 9.3<br>**Latin America:** 2,906 31.3 | 189,743<br>4.1 | 41,300<br>5.4<br>59,822 | $44,958<br>$65,126 | 217.66<br>1.2 | **IBM**<br>**AT&T Co.**<br>**Pan American World Airways**<br>**Nissan**<br>**Spanish Tourism** |
| | ***People's Daily***<br>Gao Di<br>Beijing | 52,000<br>0.0 | **Europe:** 15,000 0.0<br>**Middle East/Africa:** 7,000 0.0<br>**Asia/Pacific:** 63,000 0.0<br>**Latin America:** 13,000 0.0<br>**China:** 3,850,000 0.0 | 4,000,000<br>0.0 | 105<br>0.0<br>NA | NA<br>NA | 0.26<br>0.0 | **Sharp Electronics**<br>**Sanyo**<br>**National**<br>**Isuzu**<br>**Beijing Jeep** |
| | ***USA Today***<br>Gannett Co.<br>Arlington, Va. | 1,826,268<br>4.1 | **Europe:** 45,000 12.2[1]<br>**Asia/Pacific:** 14,000 7.7[1] | 1,885,268<br>4.3 | 57,232<br>9.8<br>74,403 | NA<br>NA | 30.36<br>5.3 | **General Motors Corp.**<br>**AT&T Co.**<br>**Stouffer Hotels**<br>**MCI Communications**<br>**Sheraton Hotels** |
| | ***The Wall Street Journal***<br>Dow Jones & Co.<br>New York | 1,857,131<br>1.2 | **Europe:** 47,821 6.8<br>**Asia/Pacific:** 38,357 3.4 | 1,943,309<br>1.3 | 123,041<br>4.8<br>NA | NA<br>NA | 63.32<br>3.4 | **AT&T Co.**<br>**Fidelity Mgt. & Research**<br>**Dreyfus**<br>**American Express**<br>**IBM** |
| Weeklies | ***Business Week***<br>McGraw-Hill<br>New York | 911,386<br>1.2 | **Europe:** 55,376 2.9<br>**Asia/Pacific:** 32,576 14.2<br>**Latin America:** 21,177 (1.1) | 1,020,515<br>1.6 | 45,205<br>7.9<br>68,715 | 48,985<br>74,460 | 44.30<br>6.2 | **IBM**<br>**AT&T Co.**<br>**Fujitsu**<br>**Hewlett-Packard**<br>**Canon Inc.** |
| | ***The Economist***<br>The Economist Newspaper<br>London | 181,521<br>12.6 | **Europe:** 177,164 11.6<br>**Middle East/Africa:** 15,169 12.3<br>**Asia/Pacific:** 44,255 7.8<br>**Latin America:** 7,257 11.9 | 425,366<br>11.7 | 9,860<br>9.6<br>31,000 | 10,900<br>43,100 | 23.18<br>(1.9) | **Singapore Airlines**<br>**Boeing Co.**<br>**Audemars Piguet**<br>**Bankers Trust**<br>**Cathay Pacific** |
| | ***The Guardian Weekly***<br>Guardian Publications<br>Manchester, England | 26,305<br>4.8 | **Europe:** 16,144 2.8<br>**Middle East/Africa:** 3,971 1.2<br>**Asia/Pacific:** 16,528 10.7<br>**Latin America:** 1,356 (4.6)<br>**West Indies:** 6,879 8.0 | 71,183<br>5.5 | 3,317[2]<br>40.0<br>NA | 3,317[2]<br>NA | 46.60<br>32.7 | **Barclays Bank**<br>**Standard Chartered Bank**<br>**Halifax Bldg. Society**<br>**Jardine Fleming**<br>**Nat. Westminster Bank** |
| | ***Newsweek***<br>Newsweek Ltd.<br>New York | 3,227,522<br>(1.9) | **Atlantic:** 328,400 5.8<br>**Asia:** 214,630 2.5<br>**Latin America:** 61,258 10.4<br>**Australia:** 112,000 2.6[3] | 3,943,810<br>(0.7) | 101,845<br>6.5<br>166,305 | NA<br>NA | 25.82<br>7.3 | **Rothmans International**<br>**Singapore Airlines**<br>**Rolex**<br>**Thai Airlines**<br>**B.A.T. Tobacco** |
| | ***Paris Match International***<br>Publications Filipacchi<br>Paris | 39,732<br>13.4 | **Europe:** 137,260 0.6<br>**Middle East/Africa:** 34,543 1.5<br>**Asia/Pacific:** 1,841 (7.0)<br>**Latin America:** 3,257 (5.2)<br>**Other:** 24,256 (3.7)[4] | 240,889<br>2.0 | 10,636<br>5.1<br>15,545 | 11,062<br>16,166 | 44.15<br>3.1 | **Philip Morris Cos.**<br>**B.A.T. Tobacco**<br>**SMH Group Watches**<br>**Peugeot-Citroen**<br>**Renault** |
| | ***Time***<br>Time Warner<br>New York | 4,610,104<br>(2.9) | **Europe:** 462,196 4.8<br>**Middle East/Africa:** 73,642 1.7<br>**Asia/Pacific:** 428,892 1.6<br>**Latin America:** 92,512 4.4 | 5,667,346<br>(1.8) | 145,900<br>4.2<br>227,375 | 156,115<br>242,155 | 25.74<br>6.1 | **General Motors Corp.**<br>**Chrysler Corp.**<br>**Philip Morris Cos.**<br>**K mart Corp.**<br>**Toyota Motor Corp.** |
| Monthlies | ***Cosmopolitan***<br>Hearst Corp.<br>New York | 2,745,000<br>NA | **Europe:** 1,750,000 NA<br>**Middle East/Africa:** 120,000 NA<br>**Asia/Pacific:** 575,000 NA<br>**Latin America:** 510,000 NA | 5,700,000<br>NA | NA[5]<br>NA<br>NA[5] | NA<br>NA | NA<br>NA | **Revlon Inc.**<br>**Nestle SA**<br>**Procter & Gamble Co.**<br>**Unilever NV**<br>**Philip Morris Cos.** |
| | ***National Geographic***<br>National Geographic Society<br>Washington | 9,459,670<br>0.3 | **Europe:** 794,802 9.9<br>**Middle East/Africa:** 72,963 7.7<br>**Pacific:** 406,598 6.3<br>**Latin America:** 102,635 4.2 | 1,836,667<br>1.0 | 136,725<br>0.0<br>180,480 | 136,725<br>180,480 | 12.62<br>(0.9) | **Canon Inc.**<br>**Hitachi**<br>**Iberia Airlines**<br>**Citizen Watch**<br>**Lufthansa Airlines** |
| | ***Reader's Digest***<br>Reader's Digest Association<br>Pleasantville, N.Y. | 18,687,211<br>2.2 | **Atlantic:** 7,167,564 (0.3)<br>**Asia/Pacific:** 1,728,223 (0.4)<br>**Latin America:** 1,195,739 (0.7) | 28,778,737<br>1.3 | 265,125<br>4.5<br>353,875 | 303,785<br>403,495 | 9.47<br>3.8 | **Unilever**<br>**Mazda Motors**<br>**Eastman Kodak**<br>**Franklin Mint**<br>**Nestle** |
| | ***Scientific American***<br>Scientific American<br>New York | 524,636<br>(0.7) | **Europe:** 77,322 2.9<br>**Middle East/Africa:** 4,473 16.8<br>**Asia/Pacific:** 24,283 10.6<br>**Latin America:** 5,112 (3.5)<br>**Atlantic Islands/Military Overseas:** 3,195 0.1 | 639,021<br>0.1 | 21,800<br>6.9<br>32,700 | NA<br>NA | 34.11<br>6.7 | **Lockheed Corp.**<br>**Hughes Aircraft**<br>**Digital Equipment**<br>**Asea Brown Boveri**<br>**Hortsmann Software** |
| Other | ***WorldPaper***[6]<br>World Times<br>Boston | 3,000<br>0.0 | **Middle East/Africa:** 10,000 (65.5)<br>**Asia/Pacific:** 260,800 10.3<br>**Latin America:** 359,300 (36.7)<br>**Iceland:** 10,000 0.0<br>**Soviet Union:** 270,000 0.0 | 913,100<br>(18.2) | 38,090<br>0.0<br>NA | 38,090<br>NA | 41.72<br>22.3 | **AT&T Co.**<br>**Philadelphia Stock Exchange**<br>**Guardian Bank**<br>**Lufthansa Airlines**<br>**ADM** |
| | ***Fortune***<br>Time Warner<br>New York | 677,042<br>0.7 | **Europe/Middle East/Africa:** 61,178 8.6<br>**Asia/Pacific:** 44,518 10.9<br>**Latin America:** 11,622 0.2 | 794,360<br>1.5 | 35,690<br>7.5<br>54,610 | NA<br>NA | 44.93<br>6.3 | **Cleveland Economic Dev.**<br>**Knowledgeware**<br>**Bank of America**<br>**Canadian Business Jets**<br>**Four Seasons Hotels** |
| | ***World Link***[7]<br>World Link Publications<br>part of World Economic Forum<br>Geneva, Switzerland | 11,892<br>21.5 | **Europe:** 17,496 9.6<br>**Middle East/Africa:** 2,014 (8.8)<br>**Asia/Pacific:** 6,725 5.3<br>**Latin America:** 1,766 8.3 | 39,893<br>10.9 | 10,770<br>0.0<br>13,850 | 10,770<br>13,850 | 269.97<br>(9.8) | **Audi**<br>**Asea Brown Boveri**<br>**Union Bank of Switzerland**<br>**Remy Martin**<br>**Price Waterhouse** |

**Note:** [1] Second half '90 projection. [2] Full page b&w figure of pound sterling 1,750 converted to dollars using the Sept. 1990 rate of 1.8954. [3] March '89/'90 ABC numbers. [4] Other circulation comprises 10,096 for airlines and 14,160 for French territories. [5] No figures available for b&w and color pages since rates are given on a case-by-case basis for 24 different editions of the magazine. [6] Distributed as a newspaper/magazine supplement. [7] Published bi-monthly. **Source:** AA survey. See How to read these rankings, Page S-10.

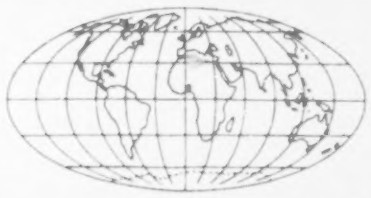
**Compiled by:** Ilse Cermak

# Unilever ranked No. 1 in non-U.S. advertising

| Rank | Advertiser | Headquarters | Primary business | Countries in which spending was reported for 1989 | Non-U.S. spending 1989 | '88-'89 % chg | U.S. spending 1989 | W'wide spending 1989 | Non-U.S. as % of w'wide |
|---|---|---|---|---|---|---|---|---|---|
| 1 | **Unilever NV** | Rotterdam/London | Soaps | Argentina, Australia, Austria, Brazil, Britain, Canada, Denmark, France, Germany, Greece, India, Italy, Japan, Malaysia, Mexico, Netherlands, Pan Arabia, Portugal, Puerto Rico, South Africa, Spain, Switzerland, Taiwan, Thailand, Turkey | $1,140.1 | (5.1) | $604.1 | $1,744.2 | 65.4 |
| 2 | **Procter & Gamble Co.** | Cincinnati | Soaps | Australia, Austria, Britain, Canada, France, Germany, Greece, India, Italy, Japan, Malaysia, Mexico, Netherlands, Pan Arabia, Puerto Rico, Taiwan, Thailand, Turkey | 934.0 | (2.3) | 1,779.3 | 2,713.3 | 34.4 |
| 3 | **Nestle SA** | Vevey, Switzerland | Food | Argentina, Australia, Austria, Brazil, Britain, France, Germany, India, Japan, Malaysia, Mexico, Netherlands, Pan Arabia, Portugal, Puerto Rico, Spain, Switzerland, Taiwan, Thailand | 534.6 | 1.0 | 608.4 | 1,143.0 | 46.8 |
| 4 | **Renault SA** | Paris | Automotive | Argentina, Austria, Britain, France, Germany, Italy, Netherlands, Pan Arabia, Portugal, Spain, Switzerland, Thailand | 432.0 | 16.1 | 0.0* | 432.0 | 100.0 |
| 5 | **Philip Morris Cos.** | New York | Food | Argentina, Australia, Austria, Brazil, Britain, Canada, Denmark, France, Germany, Hong Kong, Japan, Mexico, Netherlands, Pan Arabia, Spain, Taiwan, Thailand | 430.1 | (2.0) | 2,072.0 | 2,502.1 | 17.2 |
| 6 | **Fiat SpA** | Turin, Italy | Automotive | Brazil, Britain, Denmark, France, Germany, Italy, Netherlands, Portugal, Spain, Switzerland | 403.0 | 34.5 | 0.5* | 403.5 | 99.9 |
| 7 | **Matsushita Electric Industrial Co.** | Osaka, Japan | Electronics | Brazil, Britain, Hong Kong, Japan, Malaysia, Pan Arabia, Taiwan, Thailand | 387.2 | 3.0 | 181.7* | 568.9 | 68.1 |
| 8 | **PSA Peugeot-Citroen SA** | Paris | Automotive | Argentina, Austria, Britain, Denmark, France, Germany, Netherlands, Pan Arabia, Portugal, Spain, Switzerland, Thailand | 363.1 | 12.2 | 17.2* | 380.3 | 95.5 |
| 9 | **Nissan Motor Co.** | Tokyo | Automotive | Australia, Britain, Germany, Japan, Mexico, Pan Arabia, Switzerland, Thailand | 348.7 | 8.2 | 300.6 | 649.3 | 53.7 |
| 10 | **Volkswagen AG** | Wolfsburg, Germany | Automotive | Brazil, Britain, France, Germany, Mexico, South Africa, Spain, Sweden, Switzerland, Thailand | 335.6 | 23.0 | 131.9 | 467.5 | 71.8 |
| 11 | **Mazda Motor Corp.** | Hiroshima, Japan | Automotive | Australia, Austria, Denmark, Germany, Japan, Pan Arabia, Thailand | 333.4 | 66.1 | 196.3 | 529.7 | 62.9 |
| 12 | **Kao Corp.** | Tokyo | Soaps | Hong Kong, Japan, Taiwan, Thailand | 325.1 | (6.9) | 21.2* | 346.3 | 93.9 |
| 13 | **General Motors Corp.** | Detroit | Automotive | Austria, Brazil, Britain, Canada, Denmark, Finland, France, Germany, Mexico, Netherlands, Norway, Pan Arabia, Spain, Sweden, Switzerland, Thailand | 323.9 | 3.9 | 1,363.8 | 1,687.7 | 19.2 |
| 14 | **Toyota Motor Corp.** | Toyota City, Japan | Automotive | Australia, Denmark, Germany, Japan, Pan Arabia, Switzerland, Thailand | 322.2 | 8.5 | 417.6 | 739.8 | 43.6 |
| 15 | **Suntory** | Tokyo | Beer | Japan | 311.5 | 47.9 | 2.3* | 313.8 | 99.3 |
| 16 | **Hitachi Ltd.** | Tokyo | Electronics | Japan, Pan Arabia, Thailand | 297.1 | 18.7 | 17.7* | 314.8 | 94.4 |
| 17 | **Mars Inc.** | McLean, Va. | Food | Australia, Austria, Britain, Denmark, France, Germany, Japan, Netherlands, Switzerland, Thailand | 290.3 | (9.6) | 293.3 | 583.6 | 49.7 |
| 18 | **Toshiba Corp.** | Tokyo | Electronics | Brazil, Hong Kong, Japan, Pan Arabia, Thailand | 274.3 | 30.8 | 18.2* | 292.5 | 93.8 |
| 19 | **Mitsubishi Motor Corp.** | Tokyo | Automotive | Australia, Japan, Pan Arabia | 273.1 | 3.6 | 73.9* | 347.0 | 78.7 |
| 20 | **Ford Motor Co.** | Dearborn, Mich. | Automotive | Argentina, Australia, Austria, Brazil, Britain, Denmark, Finland, France, Germany, Mexico, Netherlands, Pan Arabia, Spain, Sweden, Switzerland, Thailand | 268.6 | 7.0 | 602.1 | 870.7 | 30.9 |
| 21 | **NEC Corp.** | Tokyo | Electronics | Japan, Mexico, Pan Arabia, Thailand | 259.1 | 11.4 | 23.1* | 282.2 | 91.8 |
| 22 | **Colgate-Palmolive Co.** | New York | Soaps | Australia, Brazil, Denmark, France, Germany, Greece, India, Italy, Malaysia, Mexico, Portugal, Puerto Rico, South Africa, Thailand, Turkey | 257.1 | (2.3) | 246.3 | 503.4 | 51.1 |
| 23 | **Honda Motor Co.** | Tokyo | Automotive | Australia, Brazil, Japan, Mexico, Pan Arabia, Thailand | 247.6 | 1.0 | 298.8 | 546.4 | 45.3 |
| 24 | **Coca-Cola Co.** | Atlanta | Food | Argentina, Austria, Brazil, Britain, Canada, France, Germany, Japan, Mexico, Pan Arabia, Spain, Taiwan, Thailand, Turkey | 244.4 | 2.8 | 385.3 | 629.7 | 38.8 |
| 25 | **Ferrero SpA** | Perugia, Italy | Food | France, Germany, Italy | 238.7 | 17.3 | 5.7* | 242.4 | 97.6 |
| 26 | **Nippon Telephone & Telegraph** | Tokyo | Utilities | Japan | 230.9 | 30.4 | 0.2* | 231.1 | 99.9 |
| 27 | **Asahi Breweries** | Tokyo | Beer | Japan | 229.7 | 16.3 | 0.3* | 230.0 | 99.9 |
| 28 | **Sharp Corp.** | Osaka, Japan | Electronics | Brazil, Hong Kong, Japan, Pan Arabia, Thailand | 228.0 | 38.3 | 30.8* | 258.8 | 88.1 |
| 29 | **Philips NV** | Eindhoven, Netherlands | Electronics | Argentina, Austria, Brazil, Denmark, Finland, France, Germany, Greece, Italy, Japan, Mexico, Netherlands, Pan Arabia, South Africa, Sweden, Thailand, Turkey | 216.4 | 6.7 | 182.3 | 398.7 | 54.3 |
| 30 | **Henkel Group** | Duesseldorf | Soaps | Austria, France, Germany, Netherlands, Spain, Turkey | 214.7 | (5.0) | 0.0 | 214.7 | 100.0 |
| 31 | **Kellogg Co.** | Battle Creek, Mich. | Food | Australia, Britain, Canada, Denmark, France, Germany, Japan, Mexico, Pan Arabia, South Africa, Thailand | 212.1 | 12.7 | 611.6 | 823.7 | 25.7 |
| 32 | **Sony Corp.** | Tokyo | Electronics | Japan, Mexico, Pan Arabia, Thailand | 204.3 | 37.4 | 356.5 | 560.8 | 36.4 |
| 33 | **Kirin Brewery Co.** | Tokyo | Beer | Japan, Thailand | 198.0 | 5.9 | 0.0 | 198.0 | 100.0 |
| 34 | **Ajinomoto Co.** | Tokyo | Food | Japan, Thailand | 197.6 | 35.3 | 0.0 | 197.6 | 100.0 |
| 35 | **Shiseido Co.** | Tokyo | Cosmetics | Japan, Thailand | 193.9 | 19.4 | 2.6* | 196.5 | 98.7 |
| 36 | **Sapporo Breweries** | Tokyo | Beer | Japan | 191.4 | 10.6 | 0.0 | 191.4 | 100.0 |
| 37 | **Daiei** | Kobe, Japan | Retail | Japan | 190.4 | 5.2 | 0.0 | 190.4 | 100.0 |
| 38 | **Fuji Photo Film** | Tokyo | Photography | Japan, Mexico, Thailand | 175.3 | 14.8 | 14.3* | 189.6 | 92.5 |
| 39 | **Takashimaya** | Osaka, Japan | Retail | Japan | 169.9 | 10.9 | 0.0 | 169.9 | 100.0 |
| 40 | **Mitsukoshi** | Tokyo | Retail | Japan | 168.6 | NA | 0.0 | 168.6 | 100.0 |
| 41 | **Fujitsu Ltd.** | Tokyo | Computers | Japan, Thailand | 167.6 | 7.5 | 5.8* | 173.4 | 96.7 |
| 42 | **Lion Corp.** | Tokyo | Soaps | Japan, Taiwan | 165.5 | (7.3) | 0.0 | 165.5 | 100.0 |
| 43 | **McDonald's Corp.** | Oak Brook, Ill. | Food | Australia, Austria, Brazil, Britain, Canada, Denmark, Germany, Hong Kong, Japan, Mexico, New Zealand, Singapore | 159.7 | 10.1 | 774.4 | 934.1 | 17.1 |
| 44 | **Tokyo Electric Power** | Tokyo | Utilities | Japan | 153.9 | NA | 0.0* | 153.9 | 100.0 |
| 45 | **Matsushita Kogyo** | Yokohama, Japan | Electronics | Japan | 136.5 | NA | 0 | 136.5 | 100.0 |
| 46 | **Suzuki Motor Co.** | Hamamatsu, Japan | Automotive | Japan, Thailand | 130.5 | 17.8 | 26.6* | 157.1 | 83.1 |
| 47 | **Saiyu** | Tokyo | Retail | Japan | 128.4 | NA | 0 | 128.4 | 100.0 |
| 48 | **PepsiCo Inc.** | Purchase, N.Y. | Food | Argentina, Australia, Brazil, Britain, Canada, Japan, Mexico, Pan Arabia, Singapore, Taiwan | 127.7 | (4.1) | 786.1 | 913.8 | 14.0 |
| 49 | **Standa** | Rome | Retail | Italy | 126.7 | NA | 0* | 126.7 | 100.0 |
| 50 | **C&A** | Amsterdam | Retail | Brazil, Germany, Netherlands | 122.3 | (18.0) | 0 | 122.3 | 100.0 |

**Notes and sources:** Advertising expenditures are in millions of U.S. dollars for year end 1989. In many countries, ad spending figures are estimates and/or gross figures. * indicates that U.S. spending figures include measured media only as reported by LNA/Arbitron Multi Media reports. All other U.S. spending figures include estimated unmeasured expenditures from AA's 100 Leading National Advertisers, Sept. 26, 1990. Non-U.S. ad spending includes only countries in the column headed "Countries in which spending was reported." Rankings of the top 10 advertisers in 38 countries begin on Page S-6. Pan Arabia includes Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar and Oman. For more information, see "How to read these rankings," Page S-10.

**AA chart:** Kevin Brown and Ilse Germak



## NEW STRATEGY FOR WORLD TECHNOLOGY MARKETS.

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# Top 10 advertisers in 38 countries

## Africa Middle East

**South Africa** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| OK Bazaars | $13.736 | $14.973 | (8.3) |
| Unilever NV | 12.885 | 13.471 | (4.3) |
| Checkers | 12.846 | 11.332 | 13.4 |
| Pick 'n Pay | 12.227 | 13.425 | (8.9) |
| SA Breweries | 9.209 | 8.783 | 4.8 |
| Toyota SA* | 6.501 | 7.782 | (16.5) |
| Distillers Corp | 6.230 | 2.184 | 185.2 |
| Nissan* | 5.417 | 5.643 | (4.0) |
| Volkswagen AG | 5.378 | 5.643 | (4.7) |
| Stellenbosch Farmers Wineries | 5.224 | 4.505 | 15.9 |

**Notes:** Converted at 0.38694 and 0.45510 U.S. dollars to the rand. * Indicated companies are locally owned and are not included in Top 50 totals on Page S-4. **Source:** Market Research Africa

**Israel** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Elite | $4.700 | $2.900 | 62.1 |
| Bank Hapoalim | 3.700 | 3.600 | 2.8 |
| Osem Foods | 3.500 | 3.000 | 16.7 |
| Mifal Hapayis Lottery | 3.400 | 3.100 | 9.7 |
| Bank Leumi | 3.100 | 4.100 | (24.4) |
| Israel Discount Bank | 2.800 | 2.600 | 7.7 |
| First International Bank | 2.600 | 2.400 | 8.3 |
| Elyashar Imports | 2.500 | NA | NA |
| Tadiran | 2.400 | NA | NA |
| Tnuva | 2.400 | 2.200 | 9.1 |

**Notes:** Figures reported in U.S. dollars. **Source:** Advertisers Association of Israel

**Pan Arabia** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Philip Morris Cos | $10.763 | NA | NA |
| Procter & Gamble Co | 9.564 | NA | NA |
| Toyota Motor Corp | 6.179 | NA | NA |
| Rothmans International | 6.059 | NA | NA |
| Matsushita Electric Industrial Co | 4.063 | NA | NA |
| Nissan Motor Co | 3.910 | NA | NA |
| PepsiCo Inc | 3.017 | NA | NA |
| Sony Corp | 2.492 | NA | NA |
| Casio | 2.284 | NA | NA |
| Unilever NV | 2.212 | NA | NA |

**Notes:** Figures reported in U.S. dollars. Includes spending in Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar and Oman. **Source:** Middle East Marketing Research

## Asia Pacific

**Australia** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Coles Myer | $80.798 | $80.107 | 0.9 |
| Unilever NV | 48.359 | 42.757 | 13.1 |
| Kellogg Co | 25.356 | 16.089 | 57.6 |
| Telecom Australia | 24.600 | 15.199 | 61.9 |
| Amatil Ltd | 23.972 | 24.996 | (4.1) |
| Mitsubishi Motor Corp | 23.901 | 13.633 | 75.3 |
| Nestle SA | 23.602 | 18.415 | 28.2 |
| PepsiCo Inc | 22.682 | 17.825 | 27.2 |
| Australian Government | 22.365 | 21.964 | 1.8 |
| Toyota Motor Corp | 21.931 | 11.284 | 94.3 |

**Notes:** Converted at 0.80034 and 0.75470 U.S. dollars to the Australian dollar. **Source:** Tart Research

**Hong Kong** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Philip Morris Cos | $8.840 | $10.380 | (14.8) |
| Hong Tai Travel | 6.940 | 5.120 | 35.5 |
| Japan Tobacco Co | 6.530 | 4.970 | 31.4 |
| Kao Corp | 5.870 | 4.870 | 20.5 |
| McDonald's Corp | 5.480 | 4.870 | 12.5 |
| Matsushita Electric Industrial Co | 5.480 | 5.320 | 3.0 |
| Toshiba Corp | 5.380 | NA | NA |
| Sharp Corp | 5.140 | 3.830 | 34.2 |

**Hong Kong** (continued)

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| B.A.T. Industries PLC | 4.980 | 4.040 | 23.3 |
| Sunflower Travel | 4.370 | 4.820 | (9.3) |

**Notes:** Figures reported in U.S. dollars. **Source:** AGB Hong Kong, HK Adex

**India** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $12.196 | $27.681 | (55.9) |
| Colgate-Palmolive Co | 4.024 | 7.971 | (49.5) |
| Parle Products | 3.899 | NA | NA |
| Godrej | 3.836 | NA | NA |
| MRF | 3.396 | NA | NA |
| Nirma Chemicals | 3.207 | NA | NA |
| Videocon | 3.144 | NA | NA |
| Nestle SA | 2.892 | NA | NA |
| Procter & Gamble Co | 2.830 | NA | NA |
| Reliance | 2.704 | 17.421 | (84.5) |

**Notes:** Converted at 0.06288 and 0.07360 U.S. dollars to the rupee.

**Japan** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Matsushita Electric Industrial Co | $337 | $334 | 0.7 |
| Kao Corp | 314 | 338 | (7.1) |
| Suntory | 312 | 211 | 47.9 |
| Hitachi Ltd | 295 | 249 | 18.7 |
| Mazda Motor Corp | 292 | 175 | 66.9 |
| Nissan Motor Co | 260 | 248 | 4.8 |
| Toshiba Corp | 260 | 199 | 30.6 |
| NEC Corp | 257 | 231 | 11.3 |
| Mitsubishi Motor Corp | 248 | 249 | (0.3) |
| Toyota Motor Corp | 236 | 220 | 7.3 |

**Notes:** Converted at [illegible]0745 and 0.00769 U.S. dollars to the yen. **Source:** AA[illegible]ureau reports

**Malaysia** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Rothmans International | $16.317 | $11.402 | 43.1 |

**Malaysia** (continued)

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| B.A.T. Industries PLC | 12.609 | 12.321 | 2.3 |
| RJR N[illegible]e | 10.755 | 6.091 | 76.6 |
| Nestle SA | 9.642 | 7.722 | 24.9 |
| Colgate-Palmolive Co | 6.304 | 4.587 | 37.4 |
| Unilever NV | 5.563 | 5.063 | 9.9 |
| Matsushita Electric Industrial Co | 3.709 | NA | NA |
| Royal Dutch Shell | 2.596 | 1.667 | 55.7 |
| Fraser & Neave | 2.225 | NA | NA |
| Dutch Lady | 2.225 | NA | NA |

**Notes:** Converted at 0.37085 and 0.38350 U.S. dollars to the Malaysian dollar. **Source:** Survey Research Malaysia

**New Zealand** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Farmers | $6.817 | $10.010 | (31.9) |
| New World Supermarkets | 6.099 | 6.255 | (2.5) |
| F.W. Woolworth | 4.876 | 4.242 | 14.9 |
| Smiths City | 4.182 | 4.039 | 3.5 |
| Telecom Services | 3.895 | 5.294 | (26.4) |
| The Warehouse | 3.678 | 2.150 | 71.1 |
| McDonald's Corp | 3.352 | 3.553 | (5.6) |
| P[illegible]bank | 3.196 | 3.497 | (8.6) |
| Foodtown | 2.949 | NA | NA |
| TVNZ Advertising | 2.906 | 2.921 | (0.5) |

**Notes:** Converted at 0.60458 and 0.65480 U.S. dollars to the NZ dollar. **Source:** AGB McNair

**Singapore** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| McDonald's Corp | $2.581 | $2.078 | 24.2 |
| Yaohan | 2.504 | 2.068 | 21.1 |
| American Express Co | 2.043 | 1.195 | 71.1 |
| PepsiCo Inc | 1.598 | 1.604 | (0.4) |
| Singapore Airlines | 1.526 | 1.209 | 26.2 |
| Tiger Beer | 1.454 | 1.091 | 33.3 |
| Courts Furniture | 1.306 | 1.002 | 30.3 |

*(Continued on Page S-10)*

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Tom Fears
*(Olympics)*
Jesse Owens
*(Boxing)*
Joe Louis
Rocky Marciano
Jack Dempsey

(Continued from Page S-6)

**Singapore** (continued)

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Metro | 1,203 | 622 | 93.5 |
| Raymond Weil Watch | 1,137 | NA | NA |
| Citibank | 1,101 | NA | NA |

**Notes:** Converted at 0.51212 and 0.49350 U.S. dollars to the Singapore dollar. **Source:** SRS Adex

**South Korea** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Samsung Co | $39,068 | $25,728 | 51.9 |
| Lucky | 35,678 | 28,408 | 25.6 |
| Pacific Chemical | 34,042 | 29,346 | 16.0 |
| Lotte Group | 33,401 | 26,130 | 27.8 |
| Goldstar | 28,476 | 24,924 | 14.3 |
| Dongsuh Foods | 17,678 | 12,998 | 36.0 |
| Daewoong Pharmaceuticals | 15,465 | 13,802 | 12.1 |
| Daewoo Electronics | 15,189 | 10,050 | 51.1 |
| HaiTai Confectionery | 14,644 | 12,998 | 12.7 |
| Nongshim | 14,445 | 13,668 | 5.7 |

**Notes:** Converted at 0.00149 and 0.00134 U.S. dollars to the won. **Source:** AA Bureau reports

**Taiwan** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| President Food Co | $17,210 | $10,831 | 58.9 |
| Culture Enterprise Corp | 11,443 | NA | NA |
| Nice Group | 9,211 | NA | NA |
| Matsushita Electric Industrial Co | 8,035 | 6,826 | 17.7 |
| Sampo Electric | 7,894 | 5,453 | 44.8 |
| Sam Shin Trading | 7,551 | 4,591 | 64.5 |
| Nestle SA | 7,519 | 7,818 | (3.8) |
| King Car Co | 7,417 | NA | NA |
| Ko Lin Electric | 6,656 | 4,939 | 34.8 |
| Kuo Lien Chemical Industry | 6,478 | 5,744 | 12.8 |

**Notes:** Converted at 0.03665 and 0.03480 U.S. dollars to the Taiwan dollar. **Source:** AA Bureau reports

**Thailand** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Osothsapha | $9,653 | $7,766 | 24.3 |
| Unilever NV | 9,390 | 12,369 | (24.1) |
| Colgate-Palmolive Co | 8,039 | 8,844 | (9.1) |
| Nestle SA | 6,168 | 4,447 | 38.7 |
| Saha Pathanapibul Co | 3,936 | 5,249 | (25.0) |
| T.C. Pharmaceutical Industrial | 3,544 | 3,858 | (8.1) |
| Matsushita Electric Industrial Co | 3,128 | 2,883 | 8.5 |
| Boon Rawd Brewery | 3,002 | 2,451 | 22.4 |
| Nissan Motor Co | 2,812 | 2,365 | 18.9 |
| Procter & Gamble Co | 2,769 | NA | NA |

**Notes:** Converted at 0.03913 and 0.04174 U.S. dollars to the baht.
**Source:** Media Focus

## Europe

**Austria** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $33,386 | $33,118 | 0.8 |
| Billa Konzern | 14,778 | 12,183 | 21.3 |
| Konsum Oesterreich | 12,337 | 9,958 | 23.9 |
| Mars Inc | 11,725 | 10,537 | 11.3 |
| Raiffeisen Bank | 11,000 | 10,423 | 5.5 |
| Procter & Gamble Co | 10,630 | 10,716 | (0.8) |
| Spar | 10,403 | 8,418 | 23.6 |
| Porsche AG | 9,844 | 8,304 | 18.5 |
| Henkel Group | 9,746 | 11,107 | (12.3) |
| Meinl | 8,786 | NA | NA |

**Notes:** Converted at 0.07555 and 0.08149 U.S. dollars to the schilling. **Source:** A.C. Nielsen

**Britain** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $177 | $183 | (2.9) |
| Procter & Gamble Co | 144 | 151 | (4.7) |
| Nestle SA | 111 | 121 | (8.2) |
| Mars Inc | 100 | 122 | (18.5) |
| Philip Morris Cos | 92 | 92 | 0.1 |
| Kellogg Co | 84 | 78 | 7.6 |
| British Telecom | 75 | 78 | (3.2) |
| PSA Peugeot-Citroen SA | 72 | 56 | 30.1 |
| Water Authorities Association | 65 | 0 | NA |
| Ford Motor Co | 63 | 52 | 21.3 |

**Notes:** Converted at 1.67424 and 1.77170 U.S. dollars to the pound. **Source:** Campaign

**Denmark** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| FDB | $8,605 | NA | NA |
| Magasin | 5,148 | NA | NA |
| Dansk Supermarked | 4,786 | NA | NA |
| Aller | 3,966 | NA | NA |
| Unilever NV | 3,335 | NA | NA |
| Illum's | 2,851 | NA | NA |
| Scandinavian Airlines System | 2,789 | NA | NA |
| MD Foods | 2,768 | NA | NA |
| Kellogg Co | 2,703 | NA | NA |
| Carlsberg Brewery | 2,432 | NA | NA |

**Notes:** Converted at 0.13718 and 0.14960 U.S. dollars to the kroner. **Source:** Brogger & Nygart Dansk Markedeforing

**Finland** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| SKOBANK Group | $15,859 | NA | NA |
| Valio Finnish Cooperative Dairy Assn | 15,859 | NA | NA |
| Kesko | 12,361 | NA | NA |
| Alo Concern | 12,361 | NA | NA |
| Veho | 11,894 | NA | NA |
| Korpivaara | 11,894 | NA | NA |
| OKOBANK Group | 11,428 | NA | NA |
| Philips NV | 8,629 | NA | NA |
| OKOBANK Real Estate | 8,163 | NA | NA |
| Haka-Auto | 7,696 | NA | NA |

**Notes:** Converted at 0.23372 and 0.23900 U.S. dollars to the markka. **Source:** A.C. Nielsen

**France** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Renault SA | $159 | $128 | 24.0 |
| PSA Peugeot-Citroen SA | 137 | 127 | 7.9 |
| Volkswagen AG | 81 | 65 | 25.5 |
| Henkel Group | 73 | 57 | 10.1 |
| Sopad | 67 | 68 | (2.3) |
| Procter & Gamble Co | 65 | 62 | 4.5 |
| France Loto | 60 | 59 | 0.9 |
| Colgate-Palmolive Co | 50 | 45 | 12.7 |
| Fiat SpA | 47 | 45 | 4.8 |
| Ford Motor Co | 42 | 44 | (5.2) |

**France** (Continued)

**Notes:** Converted at 0.15675 and 0.16910 U.S. dollars to the franc. **Source:** Decisions Medias

**Germany** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Procter & Gamble Co | $176 | $172 | 2.5 |
| Unilever NV | 152 | 151 | 0.8 |
| Nestle SA | 120 | 107 | 12.6 |
| C&A | 112 | 137 | (18.3) |
| Philip Morris Cos | 101 | 125 | (19.3) |
| Henkel Group | 90 | 105 | (14.5) |
| Mars Inc | 90 | 91 | (0.8) |
| German Post Office | 90 | 76 | 17.7 |
| Volkswagen AG | 87 | 84 | 4.3 |
| General Motors Corp | 79 | 78 | 2.1 |

**Notes:** Converted at 0.53285 and 0.57220 to the mark.
**Source:** Schmidt & Pohlman, a Nielsen subsidiary

**Greece** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $9,140 | $8,402 | 8.8 |
| Sopral AE | 5,427 | 5,767 | (5.9) |
| Procter & Gamble Co | 4,964 | 4,891 | 1.5 |
| Colgate-Palmolive Co | 4,595 | 4,514 | 1.8 |
| Delta Dairy Products | 4,107 | 2,848 | 44.2 |
| Elias Oils | 3,831 | 3,766 | 1.7 |
| Johnson & Johnson | 3,567 | 3,346 | 6.6 |
| Triplex | 2,686 | NA | NA |
| Adams Chicot | 2,567 | 2,385 | 7.6 |
| Philips NV | 2,564 | NA | NA |

**Notes:** Converted at 0.00626 and 0.00712 U.S. dollars to the drachma.
**Source:** AA Bureau reports

**Italy** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $313 | $373 | (16.1) |
| Procter & Gamble Co | 229 | 293 | (21.9) |
| Fiat SpA | 193 | 121 | 59.5 |
| Ferrero SpA | 161 | 133 | 20.6 |
| Standa | 127 | NA | NA |
| Barilla SpA | 113 | 106 | 6.3 |
| Perfetti SpA | 92 | 64 | 42.7 |
| Renault SA | 86 | 80 | 7.7 |
| Ed. De Agostini | 84 | 79 | 5.7 |
| Saipo | 83 | 79 | 4.1 |

**Notes:** Converted at 0.00073 and 0.00077 U.S. dollars to the lira. **Source:** A.C. Nielsen

**Netherlands** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $15,314 | $15,354 | (0.3) |
| Procter & Gamble Co | 10,737 | 11,030 | (2.7) |
| Rijksvoorlichtingsdienst | 8,431 | 10,190 | (17.3) |
| Mars Inc | 8,420 | 10,414 | (19.1) |
| Philips NV | 6,892 | 8,333 | (17.3) |
| Postbank | 6,623 | 6,500 | 1.9 |
| Albert Heijn | 6,490 | 6,086 | 6.6 |
| Heineken | 6,406 | 8,891 | (27.9) |
| PSA Peugeot-Citroen SA | 6,153 | 6,675 | (7.8) |
| Sara Lee Corp | 5,907 | 7,921 | (25.4) |

**Notes:** Converted at 0.47195 and 0.51120 U.S. dollars to the guilder. **Source:** Adformatie

**Norway** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Norske Meierier | $4,466 | NA | NA |
| De-No-Fa Lilleborg Fabrik | 3,596 | NA | NA |

**Norway** (Continued)

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Norsk Tipping A/S | 3,160 | NA | NA |
| IBM Corp | 2,960 | NA | NA |
| General Motors Corp | 2,900 | NA | NA |
| S.A.S. | 2,711 | NA | NA |
| DNC | 2,406 | NA | NA |
| Hjemmet-Gruppen A/S | 2,336 | NA | NA |
| Freia | 2,192 | NA | NA |
| Mortensen Ernst G Forlag | 2,113 | NA | NA |

**Notes:** Converted at 0.14541 and 0.15400 U.S. dollars to the kroner. **Source:** A.C. Nielsen

**Portugal** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $12,884 | NA | NA |
| Renault SA | 6,167 | NA | NA |
| Nestle SA | 5,735 | NA | NA |
| Fiat SpA | 5,008 | NA | NA |
| Mocar | 4,252 | NA | NA |
| UNICAR | 3,753 | NA | NA |
| FIMA | 3,769 | NA | NA |
| PSA Peugeot-Citroen SA | 3,091 | NA | NA |
| Santa Casa Misericordia Lisboa | 3,074 | NA | NA |
| Ministerio Das Financas | 2,959 | NA | NA |

**Notes:** Converted at 0.00640 and 0.00703 U.S. dollars to the escudo. **Source:** Nielsen

**Spain** Dollars are in millions

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| PSA Peugeot-Citroen SA | $103 | $87 | 18.6 |
| Volkswagen AG | 85 | 57 | 47.6 |

**Spain** (Continued)

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Renault SA | 85 | 73 | 16.0 |
| El Corte Ingles | 77 | 58 | 32.3 |
| Spanish Economy Ministry | 76 | 47 | 59.7 |
| Unilever NV | 52 | 48 | 9.6 |
| Fiat SpA | 52 | 35 | 49.3 |
| Nestle SA | 43 | 43 | (0.4) |
| Repsol SA | 43 | 40 | 7.2 |
| General Motors Corp | 40 | NA | NA |

**Notes:** Converted at 0.00842 and 0.00857 U.S. dollars to the peseta. **Source:** AA Bureau reports

**Sweden** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Kooperativa Forbundet | $76,894 | $76,983 | (0.1) |
| ICA AB | 72,027 | 75,343 | (4.4) |
| Ahlens AB | 23,347 | 22,496 | 3.8 |
| Volvo AB | 20,821 | 12,642 | 64.7 |
| Telverket | 16,159 | 12,795 | 26.3 |
| Volkswagen AG | 11,826 | 9,614 | 23.0 |
| Vivo-Favor Forbundet | 11,825 | 8,357 | 41.5 |
| Ford Motor Co | 10,739 | 8,315 | 29.2 |
| Hennes & Mauritz AB | 10,632 | 12,654 | (16.0) |
| General Motors Corp | 10,409 | 7,771 | 33.9 |

**Notes:** Converted at 0.15595 and 0.16300 U.S. dollars to the kroner. **Source:** IMU Testalogen

**Switzerland** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Migros | $44,228 | $46,440 | (4.8) |
| Coop | 36,490 | 39,519 | (7.7) |
| Toyota Motor Corp | 15,445 | 16,403 | (5.8) |
| General Motors Corp | 13,567 | 15,988 | (15.1) |
| Denner | 12,103 | 17,233 | (29.8) |
| Mars Inc | 10,578 | NA | NA |
| Ford Motor Co | 9,927 | 9,897 | 0.3 |
| Unilever NV | 8,761 | 14,603 | (40.0) |
| Moebel Pfister | 8,265 | NA | NA |
| HCC Automotive | 8,240 | NA | NA |

**Notes:** Converted at 0.62905 and 0.69210 U.S. dollars to the Swiss franc. **Source:** AA Bureau reports

**Turkey** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $16,578 | NA | NA |
| Veb Ofset | 6,730 | NA | NA |
| Henkel Group | 4,871 | NA | NA |
| Procter & Gamble Co | 3,890 | NA | NA |
| Fruko-Tamek | 3,560 | NA | NA |
| Arcelik | 2,796 | NA | NA |
| Marsa | 2,450 | NA | NA |
| AEG Portfolio | 2,330 | NA | NA |
| Ulker | 2,308 | NA | NA |
| Coca-Cola Co | 2,251 | NA | NA |

**Notes:** Converted at 0.00050 and 0.00080 U.S. dollars to the lira. **Source:** Deniz Reklam Etudleri

## Latin America

**Argentina** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Philip Morris Cos | $6,614 | $14,579 | (54.6) |
| Unilever NV | 5,281 | 7,086 | (25.5) |
| Aurora SACIF | 4,739 | 10,165 | (53.4) |
| B.A.T. Industries PLC | 4,102 | 9,663 | (57.6) |
| PSA Peugeot-Citroen SA | 3,012 | 3,921 | (23.2) |
| Resero SA | 2,958 | NA | NA |
| PepsiCo Inc. | 2,607 | 1,795 | 45.2 |
| Nestle SA | 2,544 | 3,986 | (36.2) |
| Lactona SA | 2,391 | NA | NA |
| S.C. Johnson & Son | 2,288 | 4,113 | (44.4) |

**Notes:** Figures reported in U.S. dollars. **Source:** Fuentes S.A.

**Brazil** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Unilever NV | $55,319 | $27,622 | 100.3 |
| Pao de Acucar | 49,414 | 17,406 | 183.9 |
| Lojas Arapua | 45,450 | NA | NA |
| Philips NV | 38,647 | 14,504 | 166.5 |
| Estrela | 35,176 | 14,990 | 134.7 |
| Bradesco | 35,023 | NA | NA |
| Muppin-Casa Anglo | 34,330 | 12,473 | 175.2 |
| Nestle SA | 33,772 | 29,013 | 16.4 |
| Lopas Consultoria | 31,694 | 11,267 | 181.3 |
| Casa Bahia | 28,652 | 9,956 | 187.8 |

**Notes:** Converted at 0.43610 and 3.43260 U.S. dollars to the new cruzero and cruzado, respectively. **Source:** Meio e Mesagem

**Mexico** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Procter & Gamble Co | $31,429 | $33,863 | (7.2) |
| Colgate-Palmolive Co | 22,726 | 22,876 | (0.7) |
| Unilever NV | 17,963 | 22,124 | (18.8) |
| PepsiCo Inc. | 16,538 | 25,736 | (35.7) |
| Ind. Vitivinicolas Domecq | 15,714 | 28,144 | (44.2) |
| Bacardi Corp. | 15,435 | NA | NA |
| Nestle SA | 13,671 | 17,910 | (23.7) |
| Kimberly-Clark Corp. | 13,495 | 18,211 | (25.9) |
| Coca-Cola Co | 13,304 | 9,331 | 42.6 |
| Philip Morris Cos. | 11,907 | 3,763 | 216.5 |

**Notes:** Converted at 0.00042 and 0.00043 U.S. dollars to the peso. **Source:** A.C. Nielsen and AA estimates

**Puerto Rico** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Procter & Gamble Co | $22,928 | $19,700 | 16.4 |
| Unilever NV | 9,631 | 14,700 | (34.5) |
| Colgate-Palmolive Co | 9,590 | 7,000 | 37.0 |
| AT&T Co | 5,643 | 4,200 | 34.4 |
| Food & Spirits | 5,453 | 6,200 | (12.0) |
| Sears, Roebuck & Co | 5,444 | 8,200 | (33.6) |
| J.C. Penney Co | 4,757 | 4,400 | 8.1 |
| PRTC | 4,691 | NA | NA |
| Anheuser-Busch Cos | 4,527 | NA | NA |
| Nestle SA | 4,139 | NA | NA |

**Source:** Publish Records Service

## North America

**Canada** Dollars are in thousands

| Advertiser | 1989 | 1988 | % chg |
|---|---|---|---|
| Government of Canada | $63,788 | $73,264 | (12.9) |
| Procter & Gamble Co | 51,484 | 47,034 | 9.5 |
| General Motors Corp | 47,590 | 42,130 | 13.0 |
| Molson Cos | 46,475 | 33,032 | 40.7 |
| Unilever NV | 39,405 | 29,087 | 35.5 |
| John Labatt Ltd | 37,500 | 33,782 | 11.0 |
| Philip Morris Cos | 37,064 | 32,454 | 14.2 |
| Cineplex Odeon Corp | 36,381 | 31,170 | 16.7 |
| Paramount Communications | 35,654 | 35,805 | (0.4) |
| McDonald's Corp | 29,232 | 25,824 | 13.2 |

**Notes:** Converted at 0.83682 and 0.80230 U.S. dollars to the Canadian dollar. **Source:** Media Measurement Services

Video News Release

WARNER BROS. A TIME WARNER COMPANY

AS QUICK AS THE FFFFFLASH

In a flash—that's how fast Warner Bros. wanted the world to know about its newest super hero. And that's how fast VISNEWS Corporate Television was able to deliver. We produce and distribute video news releases in the United States and around the world. Our overseas notification and distribution network is unbeatable. VISNEWS: Your source for timely, newsworthy VNR's that work! Here and abroad!

VISNEWS NBC REUTERS BBC

in US: 212-698-4560
overseas: UK: 44-81-453-4477

## How to read these rankings

Advertising Age's *fourth annual ranking of major advertisers outside the U.S. and sixth annual Global Media lineup contain data from around the world.*

### Global Marketers

The advertiser ranking on Page S-4 includes media spending figures from 38 countries. *Ad Age* correspondents compiled the data. Depending on availability of reliable spending data, country lists ran from as many as 200 advertisers to only the top 10 spenders.

Research companies, media-tracking services, marketing publications and ad agencies supplied media totals available in their respective markets. All media is seldom tracked in any given country. In some cases, totals were discounted from rate card-based data to reflect market realities.

Sources are listed beneath tables titled "Top 10 advertisers in 38 countries" starting on Page S-6. All figures are given in U.S. dollars.

Source lines include currency conversion rates for both 1989 and 1988, unless research companies provided the figures in U.S. dollars.

### Global Media

Circulation data collected from publishers in this report were for June 1990 compared with June 1989. Ad rates were those in effect at the same mid-year period.

Criteria for a publication's inclusion in the table on Page S-2 are:

- Substantial mass circulation on at least three continents.
- Worldwide circulation of at least 50,000 and circulation of international editions equal to at least 10% of the domestic circulation.
- Editorial content global in scope.
- Advertising in all editions purchased through a central office.

Trade publications aren't mass-circulation publications and are excluded from this listing.

Licensed publications are also excluded, because they lack central control on the advertising side. □

*Coordinating this report were Kevin Brown, Ilse Cermak, R. Craig Endicott, Nancy Giges and Julie Skur Hill.*

# RETAILING.

## Slump hits ad budgets

### Poll: Retailers to squeeze tighter; print suffers

By Adrienne Ward

Never mind recession, retail advertising is starting to look like it's entering a depression.

According to a nationwide survey of 1,262 retailers, 64.9% of respondents said advertising as a percentage of sales for the fourth quarter will decrease or remain the same as last year.

Sales promotion budgets also are being squeezed, the survey indicates. Sixty-four percent of those surveyed said sales promotion as a percentage of sales will decrease or stay the same.

"There's nothing in [these results] that I would categorize as great news for anybody," said Harvey Braun, chairman of the Trade Retail & Distribution Services division of Deloitte & Touche, which conducted the survey. "This season is not going to be a boomer year no matter how you read those numbers."

The outlook for print media is particularly grim: 73.9% of respondents said they are allocating either the same amount or less of their ad budgets to newspaper run of press; 81.7% are spending the same or less on Sunday supplements; and 88.1% are allocating the same or less to magazines.

"Magazines look like the big loser here," he said. "Newspapers show a little bit of improvement but [they were down last year, so staying flat is not good]."

Newspapers rely on retail for roughly 50% of their ad expenditures. Newspaper Advertising Bureau expects total newspaper ad expenditure growth for the year to be less than 1%.

Deloitte & Touche found 82.3% of retailers believe the U.S. is in a recession now, and 70.5% think next year will be worse.

Mr. Braun said 77.9% of retailers think industry profits will be lower this year.

The survey brings even worse tidings for the coming holiday season: "97.5% of retailers said consumers will not spend more during the 1990 holiday season than they did last year. "And last year put a very great many retailers on the ragged edge," he said.

To help their bottom lines, many retailers are reducing inventory levels (AA, Oct. 15): 21.5% reported they are trimming back, while 12.8% are offering more exclusive merchandise assortments.

"Lower inventory is going to make a big difference," Mr. Braun said. "What's happening this year is more a function of retailers risking lost sales vs. the impact of having excessive inventories after Christmas."

Unfortunately, the markdown-mania of the past few years shows no signs of abating.

"I've just been in Atlanta, and there are stores there that already have 50% off outerwear now, just because it's so important not to get stuck with the inventory," Mr. Braun said. "It becomes a self-fulfilling prophecy."

According to the survey, 27.5% of respondents plan to take major markdowns earlier than last year, and 67.9% expect to make them at the same time—which also was early.

"It's already a very tough season. The Persian Gulf, the economy—these have a whirlpool effect.

"There's even more potential for a shakeout next year," Mr. Braun added. □

### Retailer poll: Fourth-quarter outlook

■ Compared with last year's fall/winter season...

| | Decrease | Same | Increase |
|---|---|---|---|
| Markdowns as a percentage of sales will | 13.6% | 50.9% | 35.6% |
| Advertising as a percentage of sales will | 17.1 | 47.8 | 35.1 |
| Sales promotion as a percentage of sales will | 9.5 | 54.6 | 35.9 |

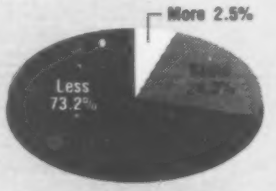
### Media spending

■ How will fourth quarter 1990 spending in the following media compare with last year?

| | Less | Same | More |
|---|---|---|---|
| Television | 23.1% | 57.9% | 19.0% |
| Magazine | 22.9 | 65.1 | 11.9 |
| Newspaper | 22.2 | 51.7 | 26.1 |
| Radio | 20.1 | 59.3 | 20.6 |
| Newspaper inserts | 17.2 | 64.0 | 18.8 |
| Cable TV | 15.2 | 65.1 | 19.7 |

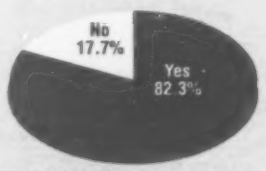
### Consumer spending

■ How will consumer holiday spending compare with last year?




### U.S. economy

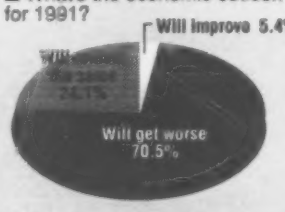
■ Is the U.S. in an economic recession?




Source: Deloitte & Touche

### 1991 outlook

■ What's the economic outlook for 1991?




CYNTHIA WATSON

## RETAIL DETAILS

**Shuttered:** Retail failures increased 12.5% to 9,732 in the first nine months of 1990, according to Dun & Bradstreet Corp. Hardest hit were New England, which closed 1,562 retail establishments, up 129% from the same period last year; and the Middle Atlantic region, with 1,242 retail failures this year, a 55.4% rise. "Every industry and every state in these two regions reported sharp increases in business failures, reflecting economic stress througout the Northeast," said Joseph Duncan, corporate economist and chief statistician for D&B.

**Wal-Mart opens new doors:** Wal-Mart Stores is testing a new discount warehouse concept that offers manufacturers' overruns and factory closeout items. Bud's Warehouse Outlet stores have opened in West Memphis, Ark., and Franklin, Tenn. Two stores are planned for Talladega, Ala., and Houma, La.

Separately, Wal-Mart Stores has reached an agreement to acquire Wholesale Club. If the merger is approved by the chain's shareholders, Wholesale Club's 27 locations eventually will be converted to Wal-Mart's Sam's Wholesale Clubs.

**Reebok steps into retail:** Reebok International will open two retail stores in the next year as a "merchandising laboratory" for the shoe marketer. The company is scheduled to open one store soon on Newbury Street in Boston. It will open another store in Santa Monica, Calif., in early 1991.

Bernadette Mansur, VP-marketing communications for Reebok, said a modest amount of local advertising would announce the store openings and would most likely be handled by Boston-based Hill, Holliday, Connors, Cosmopulos.

**Hot colors:** What's hot? Red, white and blue—and green.

J.C. Penney Co.'s children's division reports brisk sales of clothing items featuring the American flag or patriotic symbols. Clothing with environmental messages, such as "Save our wildlife" or "Preserve our rainforests," also are widely popular. Levi, JG Hook, Cotler and Bugle Boy are among marketers promoting environmental awareness. Great American Licensing, Topico Bay and Wild Oats are touting clothing with patriotic messages.

Sure they look like nice people, but after the presentation they'll eat you alive.

Your people made a great case for your company during the presentation. The facts were very convincing. But your people weren't. So now, instead of considering your company's benefits, the audience is discussing your faults.

Companies who cannot afford that kind of risk make sure their executives work with The Executive Technique – a personalized program where each participant learns to develop and enhance their unique communication style.

Fortune 500 companies in every field have used The Executive Technique to help them improve their presentation skills. So should yours.

So call us at 1-800-992-1414 to set up your company's program. We'll make sure the audience remains smiling even after your presentation is over.

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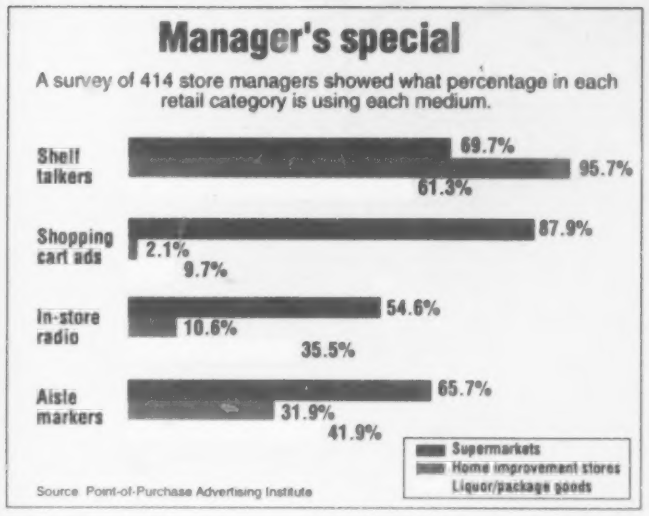


CYNTHIA WATSON

# Signs of the times

## Retailers respond to new in-store media

**By Scott Hume**

New in-store media are making inroads among retailers, but still face some resistance.

Use of manufacturer-supplied point-of-purchase signs and displays is at traditionally high levels. But retailers—especially supermarkets—also are opening their doors to newer, vendor-controlled in-store media, such as shopping cart ads, in-store radio and electronic signage.

The Point-of-Purchase Advertising Institute's 1990 Attitudes on POP Survey, released last month, measures use of and attitudes toward in-store signage, displays and media by 414 store-level managers and headquarters executives for supermarkets, liquor and package goods stores, and home improvement stores.

Use of manufacturer-supplied signage and displays was high. Among home improvement stores, 99.1% of 108 managers said they use promotional POP materials, and 74.1% said they use permanent materials. At supermarkets, 96.6% of 148 managers use promotional and 58.8% use permanent signs and displays. Among liquor stores, 97.5% of 158 managers use promotional displays; 69.9% use permanent manufacturer-supplied displays.

Such displays and signage long have been mainstays of in-store promotional marketing. But new in-store media, controlled by independent vendors rather than manufacturers, have gained acceptance *(see chart)*.

The most widely used vendor-supplied media so far are shelf talkers and, at supermarkets at least, shopping cart ads. Only supermarket managers say they use electronic signs (4%) but were the only managers not to use banners. Among home improvement store managers, 2.1% use banners; 6.5% of liquor store managers do.

Supermarket managers were the least enthusiastic about in-store media's ability to attract consumer attention.

Vendor-controlled in-store media were rated "extremely effective" attention getters by 8.1% of supermarket managers, compared with 21.3% of liquor store managers and 9.7% of home improvement store managers.

By comparison, 18.9% of supermarket managers rated manufacturer-supplied signs and displays "extremely effective" in attracting consumer attention. At home improvement stores, it was 16.7%. Only at liquor stores were traditional signs and displays received less enthusiastically (7.6%) than vendor-controlled media (21.3%).

Questions about in-store media's effectiveness with consumers may be one reason many managers don't expect to start using those media. More than half (53.1%) of the liquor store managers not using in-store media said they don't expect to use them in the future; 18.9% said they will; 27% are undecided; and 1% had no answer.

Among supermarket managers not using in-store media, expectations for future use were higher (20.4%), while 40.8% said they won't use them and 38.8% were undecided. Among home improvement store managers, 44.2% are undecided on likely future use, 40.3% said they won't and 14.3% expect they will.

POPAI's study was conducted last spring by Ehrhart-Babic Group, Englewood Cliffs, N.J. Retailers with the highest sales in each of 15 markets were interviewed in person. The margin of error is plus or minus 8.5%. []


# He's one of the most influential managers in the nation.

And he buys $15 million worth of goods and services every year.

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***City & State is the publication he reads.***

Along with his counterparts across the nation, he reads City & State more than the other two state and local government publications written specifically for him. In fact, two independent surveys—both the Erdos & Morgan/MPG 1990 Opinion Leaders survey and a market readership study by The Gallup Organization—show City & State leads the pack in readership among government leaders.

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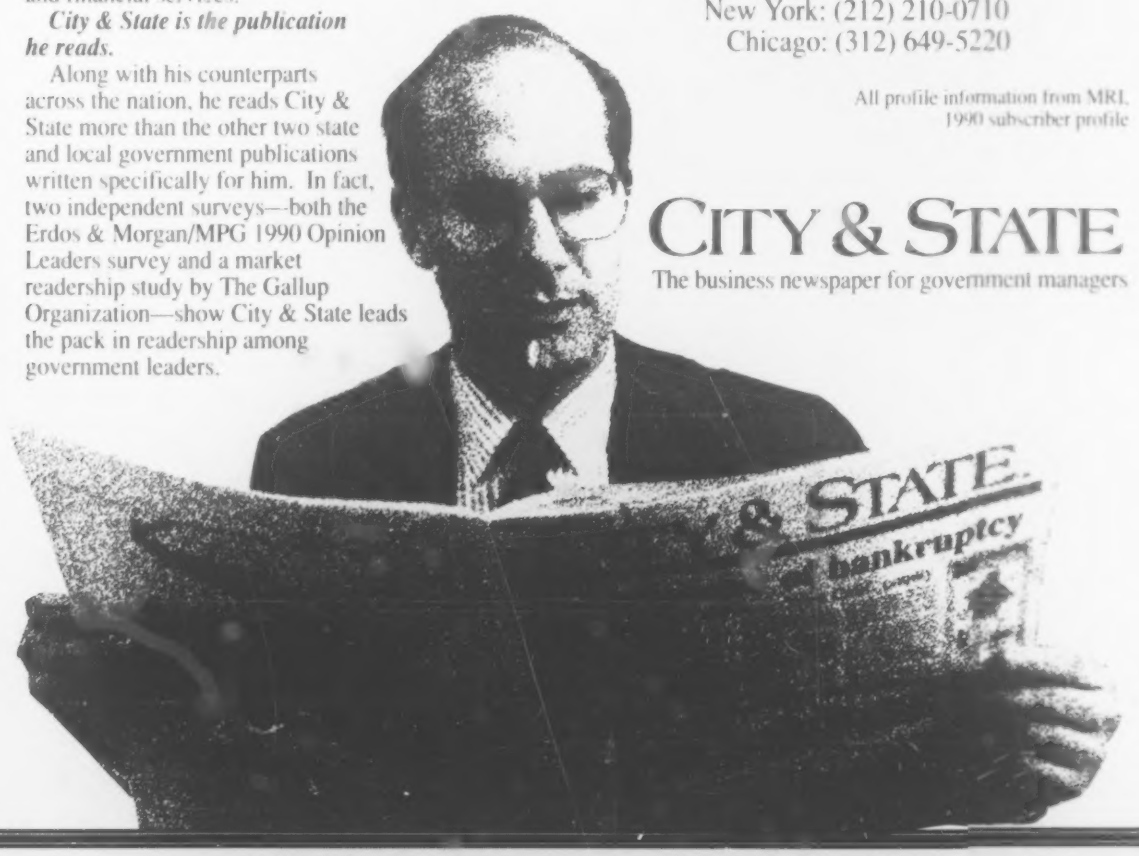
All profile information from MRI, 1990 subscriber profile




CITY & STATE
The business newspaper for government managers


## March of Dimes seeks sponsors

WHITE PLAINS, N.Y.—David C. Tintle & Associates, Hoboken, N.J., is creating a merchandising program for March of Dimes Birth Defects Foundation's 1991 WalkAmerica national fund-raiser.

The promotion agency is soliciting package-goods marketers for in-store merchandising efforts reaching about 15,000 supermarkets during March and April. Marketers are guaranteed price feature, product display and point-of-purchase materials and pay a maximum of $78 per store, which includes a significant donation to the March of Dimes. []

# AD REVIEW

## Burger King breaks the rules of fair play, free speech defense

(Rating: No stars)

**By Bob Garfield**

Garfield

Sometimes you gotta be a jerk. Sometimes you gotta have no spine. Sometimes you gotta break the rules.

Assorted public relations reverses lately have pushed Burger King Corp. and D'Arcy Masius Benton & Bowles, New York, to tactical newspaper advertising that smacks of cheap opportunism and craven capitulation. The ads are breaking the rules, all right. Chief among them: If you don't have something worthwhile to say, don't say anything at all.

The first ad followed McDonald's Corp.'s highly publicized abandonment of polystyrene foam packaging, a move of dubious environmental—but monumental symbolic—significance. Maybe the worldwide front-page news coverage left Burger King feeling neglected, or maybe the company was grasping for some thin reed of competitive advantage when it bought page ads in the big national dailies.

—"Burger King applauds McDonald's for its new environmental consciousness.

**Two tactical print ads from Burger King and D'Arcy Masius Benton & Bowles, New York, attempt to suggest corporate moral righteousness and project precisely the opposite.**

Welcome to the club. We wonder what the planet would be like if you had joined us in 1955."

And I wonder what in the world they're talking about. Burger King's use of paper packaging in 1955 obviously had nothing to do with with preserving the environment. As for the intervening years, there's no evidence that waste disposal has been an issue there until right now—when Burger King's all-consuming green consciousness involves not-yet-started pilot composting projects in exactly three of its markets.

It's disturbing enough that McDonald's was pressured by activist groups and consumer perception to abandon heat-retaining foam before the relative ecomerits of paper and plastic were certain. But it's contemptible that Burger King would exploit the confusion with a gratuitous, disingenuous, heavy-handed and graceless little dig.

Burger King is every bit the instant-gratification archetype of the consumer society that McDonald's is. Both sell plastic food from plastic palaces, and neither should be ashamed of doing it. That millions of satisfied customers line up each day to be systematically polymerized by various versions of Atherosclerosis on a Bun is a triumph of capitalism. But to suggest that somehow moral superiority reigns at the Home of the Whopper is not only insufferably smug, it's ludicrous.

Public righteousness, though, is becoming this company's favorite theme. You may recall a year ago when, after devastating natural disasters in San Francisco and the Carolinas, Burger King ostentatiously offered to send a quarter to the disaster relief fund for every Whopper sold—perhaps the single most vulgar display of false philanthropy in the checkered history of cause marketing. Then came the McDonald's packaging flap and, in the very same week, this newspaper ad:

"An Open Letter To The American People. Burger King wishes to go on record as supporting traditional American values on television, especially the importance of the family. We believe the American people desire television programs that reflect the values they are trying to instill in their children. We pledge to support such programs with our advertising dollars. BURGER KING CORPORATION."

You can feel nothing but sympathy for Burger King for being preyed upon by a few Tupelo, Miss., scolds who have organized consumer boycotts under the banner of CLeaR-TV, or Christian Leaders for Responsible Television. The group would be better named ExtORT-TV, or Extremely Overbearing Religious Troublemakers, intent as it is to sanitize the media of homosexuality, bosoms, talking back to Dad and other threats to our way of life.

But not only has Burger King negotiated with these idea terrorists, it has employed the very sanctimonious Tupelospeak of the zealots themselves. The tortured ad copy brings to mind those spontaneous stinging broadsides on U.S. policy delivered by unshaven, emaciated hostages as videotaped by their terrorist captors. "With the angry bubbling of my blood I outrageously implore you, excellency Bush, to desist with dastardly conspiracy action underneath the flesh of the Palestine hero people!"

Burger King's submitting to these self-anointed censors is cowardly, offensive and —above all—a slur against the most important of American values, which is freedom of expression. The ad makes a mockery of the First Amendment. And that's one rule no advertiser should ever break. □

*The rating system uses four stars to represent excellent, three for notable, two for mediocre and one for pathetic.*

# Election may aid ad industry issues

**By Janet Meyers**

WASHINGTON—This month's election results will have an impact on how some issues important to the ad industry are handled in the coming year.

"The dust is still settling," said Dan Jaffe, exec VP at the Association of National Advertisers, but changes in the makeup of the House Energy & Commerce Committee may affect proposals to restrict tobacco and alcohol advertising, which came out of that panel in the past year.

One of the biggest changes comes with the retirement of Rep. Thomas A. Luken, chairman of the Energy & Commerce Subcommittee on Transportation & Hazardous Materials, which has Federal Trade Commission oversight. Rep. Luken (D., Ohio) is a proponent of banning tobacco ads.

"As each slot is filled, you'll have a different transformation," Mr. Jaffe said of the vacancies that will occur.

Wally Snyder, exec VP at the American Advertising Federation, said the changes will be an improvement for the ad industry.

"I think we'll have an opportunity to have a better relationship with that committee," he said of Energy & Commerce.

But the coming year will see ad industry lobbyists wrestling again with tobacco advertising, which Rep. Henry Waxman (D., Calif.), sponsor of key legislation, has promised to reintroduce.

State activity also is likely to be rampant, with more proposals to tax advertising.

"States have a lot more revenue problems," Mr. Snyder said. "1991 will be a very challenging year. . . . We've been preparing our members." □

# Holiday

*(Continued from Page 3)*

our sales are," said Rod Eaton, director of sales promotion at Target, which has 420 stores in 32 states. "This year our heavier campaign ought to drive more of those people who aren't going to department stores to Target."

Wal-Mart declined to discuss ad plans or Christmas outlook, but analysts predict the mass merchandiser will fare well this holiday season due to its wide perception as a company with the lowest prices available on general merchandise. GSD&M, Austin, Texas, is Wal-Mart's agency.

K mart is also expected to reap good sales during the holiday season, due to its high concentration of lower-price soft merchandise. The No. 2 retailer broke a print campaign last week supported by holiday-themed TV spots (AA, Nov. 12).

"Consumers are trading downward in the current economy, and retailers with a high concentration of expensive merchandise and big-ticket items are likely to get hurt this year, said L. Wayne Hood, retail analyst with Prudential Research.

Sears, Roebuck & Co., Montgomery Ward & Co. and major electronics retailers, including Circuit City and Highland Superstores, could be hurt as sales of big-ticket durables, electronics and appliances stagnate, Mr. Hood said.

"Certain types of stores will be less adversely affected by what's going on in the market," said Kurt Barnard, a retail forecaster and publisher of *Retail Marketing Report*. He said formats such as factory outlets and off-price retailers ought to fare better.

But analysts agree that any retailer with aggressive marketing programs is likely to survive the tough season better.

Sears, the nation's largest retailer, declined to reveal its expectations for the holiday season. The company will offer "some special deals and limited-time offers on certain merchandise" throughout the holiday season, said Kathy Gucfa, public relations specialist for the Sears Merchandise Group, but no specifics are yet available. The sale items won't necessarily be advertised, she said.

Sears this week starts airing holiday TV and print ads themed "Your Christmas store and a whole lot more," via Ogilvy & Mather, Chicago.

The 61-unit Department Store Division of Dayton Hudson has also planned a more conservative holiday campaign, using "Sharing the holidays with you"-themed ads created in-house and used last year, said Becky Bailey, public relations manager.

Five Sunday newspaper circulars will drop in Dayton Hudson's core markets of Minneapolis (Dayton's), Detroit (Hudson's) and Chicago (Marshall Field's).

The company will again offer its 6-year-old plush "Santabear" for $17.50 with any purchase totaling $50. Field's will offer its 5-year-old plush "Mistletoe Bear" for $30.

Jordan Marsh Stores Corp., New England's largest department store chain, this year is resurrecting its Enchanted Village, a 6,000-square-foot scaled-down re-creation of a New England town on Christmas Eve in the year 1910; it was last used in the early '70s.

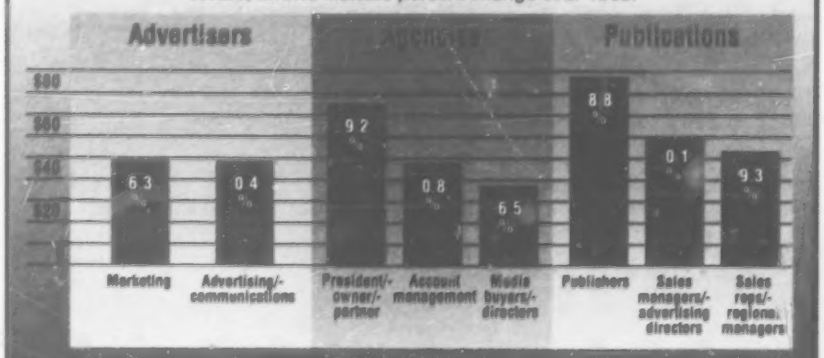
A 30-second TV commercial, created in-house, will run Nov. 18 through Dec. 5 or 6 on network affiliates in Boston. A print ad announcing the grand opening of the village ran Nov. 18 in *The Boston Globe*.

*Alison Fahey and Christy Fisher contributed to this story.*

DATAWATCH

## Money matters

In a 1990 compensation survey of business-to-business media, marketing and advertising executives, publishers report the highest median salaries. This is followed, in order, by agency owners, partners and officers and by publication sales managers and corporate advertising directors. Bars represent 1990 salaries in thousands of dollars; arrows indicate percent change over 1988.




Holly Segume/John Hall

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NEWSPAPER

# Advertising Age

November 26, 1990

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## LAST MINUTE NEWS

### Antacid wars lead to arrest

PHILADELPHIA—FBI agents last week arrested Rebecca Lindquester, 42, co-owner of Horizon Productions, Newtown Square, Pa., charging her with trying to sell proprietary marketing information on SmithKline Beecham's Tagamet antacid to Glaxo, which markets the competitive Zantac. Ms. Lindquester is said to have approached Glaxo in September and sought $500,000 for marketing campaign information detailing a new use for Tagamet. Her company, which she owns with her husband David, had been asked by SmithKline to bid on a contract to produce a videotape that would train sales representatives on the new use for Tagamet.

### HDM partners sign breakup pact

NEW YORK—The three partners in HDM have signed a preliminary agreement that will allow Paris-

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# MCI calls on Messner in battle against AT&T

**By Jon Lafayette**

MCI Communications Corp. has enlisted Messner Vetere Berger Carey Schmetterer, New York, to join its fierce uphill marketing battle against AT&T Co.

Messner, a 4-year-old agency whose billings will nearly double after adding the long-distance phone company's $51 million account, replaces Wells, Rich, Greene, which had handled MCI since 1987.

To help pitch the account, Messner called in Roger Ailes, a political consultant known for his combative campaign style.

The agency, 51% owned by French agency group RSCG Group, was a long-shot late-starter in a costly review that in addition to WRG included BBDO Worldwide; Levine, Huntley, Schmidt & Beaver; and Hal Riney & Partners, all New York; and Hill, Holliday, Connors, Cosmopulos, Boston.

"We chose Messner based on their creative strength and their knowledge of the long-distance telephone industry," said Pam Small, public relations manager for MCI.

Executives at Messner had worked on MCI while the account was at Ally & Gargano, New York, in the early 1980s and reportedly maintained relationships with MCI staffers who became decision-makers during the company's latest reorganization.

WRG executives said management changes at MCI doomed their chance of keeping the account.

Messner Partner Ron Berger acknowledged that famil-

*(Continued on Page 59)*

# Colgate axes global ads; thinks local

**By Laurie Freeman**

Colgate-Palmolive Co.'s shift to a country-by-country ad strategy will be a basic element in the company's long-term growth plans, Chairman-CEO Reuben Mark told securities analysts last week.

Executives attending the meeting said Mr. Mark stated Colgate will emphasize in-depth international marketing of its major brands—Colgate, Palmolive, Fab and Ajax.

Doug Goodman

R. Mark

The localized ad strategy is markedly different from that pursued by Clay Timon, Colgate's former VP-director of worldwide advertising.

Mr. Timon, who advocated global advertising, resigned in September after Colgate decided to decentralize the advertising function and turn responsibilities over to individual operating units.

Colgate's advertising and marketing in the '90s will be tailored specifically to local markets and countries, said industry analysts contacted by *Advertising Age*. There will be little, if any, global advertising, these sources said.

To underscore that point, they said, TV commercials from different countries were shown and no two were alike.

Colgate executives declined comment; when contacted by phone, Mr. Mark said he wouldn't discuss the meeting.

Although Colgate didn't discuss specific ad budgets, noting only that advertising as a percentage of sales is likely to increase, securities analysts said the company intends to further pare promotional spending and pump those dollars into media advertising.

Colgate, whose measured media spending fell 10% through the first half of 1990 compared with last year, is expected to post U.S. ad spending of $222 million this year. Colgate spent $246.3 million on advertising in the U.S. last year. *Advertising Age* estimates Colgate spent $257 million outside the U.S. in '89, a budget expected to maintain a pace similar to U.S. spending for 1991 to 1995.

According to industry analysts, Mr. Mark said Colgate

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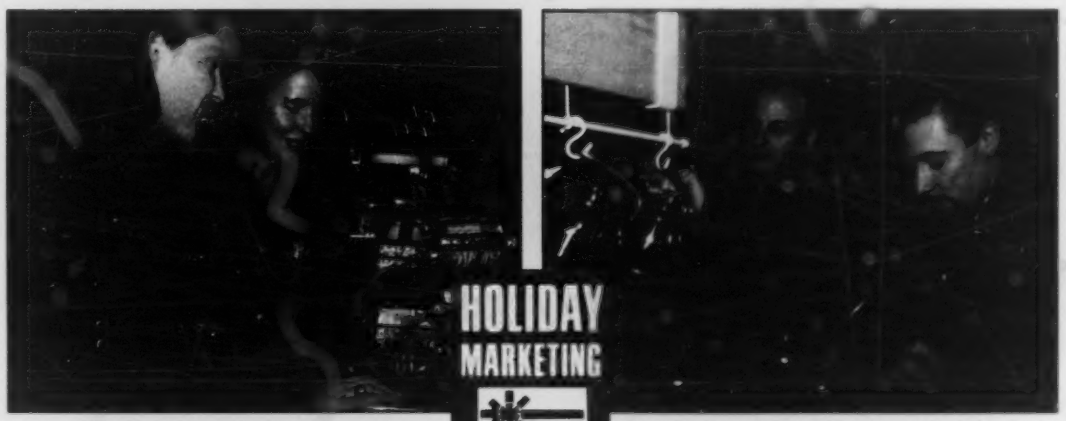


Photos by Bruce Hucher

Sisters Allison and Ann Frenett select gifts at Marshall Field's in Chicago.

New Yorkers David Gottlieb and Joe Mischaud shop at Crate & Barrel's newest Chicago store.

# CAUTIOUS KICKOFF

## Shoppers swarm stores, but rein in spending

**An Advertising Age roundup**

Consumers crowded into retail stores last Friday, the official kickoff of the holiday selling season, but cautious shoppers didn't go on a spending spree.

Many retailers, including R.H. Macy & Co., Abraham & Straus, Bloomingdale's and Saks Fifth Avenue, reported heavy traffic the day after Thanksgiving, traditionally one of the biggest shopping days of the year.

But, while most retailers said the cash registers were ringing, industry experts and an informal survey of shoppers conducted throughout the day by *Advertising Age* indicated that overriding concerns about the economy and the Middle East are causing consumers to hold back.

"Most people are scaling back their budgets," said Kurt Barnard, a New York-based retail forecaster and publisher of *The Retail Marketing Report*. "Yes, people will be out and people will be buying today, but many are browsing and shopping carefully. [If they are buying] they are buying bargains."

**"Most people are scaling back their budgets. . . . many are browsing and shopping carefully. [If they are buying] they are buying bargains."**

Mr. Barnard, who said sales were slower last Friday compared with a year ago, predicted most consumers "will buy fewer items this year, and the average amount for each [item] will be lower."

Philip Brous, professor of retailing at Columbia University's Graduate School of Business, summed up this year's gift shopper as "cautious. The stores are always mobbed the day after Thanksgiving, but I think sales will be lighter than a year ago."

He added that fourth quarter 1990 retail sales may show declines compared to 1989 when they were up slightly over 1988.

Several retailers acknowledged a slowdown in consumer spending.

"A lot [of consumers] are looking. . . . a few are buying," said John Grounds, a Radio Shack store manager in Arlington, Texas.

"It's slower than the previous

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■ **MCI Communications** has selected Messner Vetere Berger Carey Schmetterer to succeed Wells, Rich, Greene on its $51 million account, nearly doubling the billings of the 4-year-old New York agency. 1

■ **Colgate-Palmolive** will emphasize in-depth international marketing of its major brands and is shifting to a country-by-country ad strategy, Chairman-CEO Reuben Mark told securities analysts. 1

■ **American Honda's** Acura unit is looking to its second-generation Legend sedan to defend its leadership among Japanese luxury cars. 3

■ **Thomas J. Lipton Inc.** is cutting its work force, blaming the poor economy. But observers cite poor marketing practices, which the company says it will change. 3

■ **Gallo** is backing its Tott's champagne with a yearend TV blitz that could reach $8 million. 3

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# Survivor testifies in Chilko lawsuit

**By Ira Teinowitz**

CHICAGO—DDB Needham Worldwide launched its defense in a civil suit stemming from the 1987 Chilko River tragedy last week, after a U.S. District Court jury heard graphic testimony about the accident from John W. Collins, retired former president of Clorox Co.

Mr. Collins alone remained on board a raft after it struck a rock in the whitewater accident in British Columbia, dumping 11 others into the river. Five died.

The wrongful-death lawsuit now being heard was filed by the family of James Fasules, who died in the accident. He was a retired DDB Needham senior VP-management representative.

The family is claiming the trip was sponsored by DDB Needham and that the agency failed to take adequate care in choosing a guide, overseeing the trip and explaining the dangers to the men taking it.

DDB Needham contends the trip was organized for friends by Al Wolfe, the now-retired former president of its U.S. division.

Last week, the agency presented one witness before it started its defense. The trial resumes today.

Ken Stewart, British Columbia's manager of outdoor recreation, testified that at the time of the accident, the province's only licensing and safety requirements had been drawn up by an industry committee that included Ron Thompson, the guide hired by the agency.

DDB Needham this week is expected to contend Mr. Thompson's procedures were common on the river at the time and that Mr. Thompson was a respected guide.

Earlier in the week, Mr. Collins testified to the turmoil immediately after the accident; his being unable to rescue Mr. Fasules; and his successful rescue of Earl Madsen, an attorney.

Mr. Collins told the jury that immediately after the accident, he could see the men who had been thrown from the raft, including Robert Goldstein, VP-advertising at Procter & Gamble Co., who appeared dead or semiconscious (Mr. Goldstein drowned). Then he saw Mr. Fasules.

"His eyes were moving," Mr. Collins said during questioning by Brian L. Crowe, an attorney for the Fasules family.

"And his eyes were saying to you, 'Please help me'?" Mr. Crowe asked.

"That is the way I interpreted it," Mr. Collins responded.

J. Collins

"He couldn't raise up his arms or wouldn't because the life jacket was up pretty high on him?" Mr. Crowe asked.

"I don't know whether it was wouldn't or couldn't, but his arms were not up. His arms were underwater," Mr. Collins said.

"And you grasped his [life] jacket. You saw that all you were doing was pulling it higher?" Mr. Crowe asked.

"It already appeared to be too high on his body, and when I pulled on it I moved it further up his body," Mr. Collins said.

"You realized that you couldn't help him, so you let go?" Mr. Crowe asked.

"Yes, sir," responded Mr. Collins, who next saw Mr. Fasules when he identified his body that night.

Mr. Collins said Michael Miles, then president of Kraft Inc.; Art Zykiel, president of Merrill Lynch Assets Management; and Mr. Thompson were able to scramble out of the water quickly. Mattel Exec VP Joseph Morrison also got out.

Mr. Collins said he was almost unable to rescue Mr. Madsen, who had grabbed the raft but couldn't get in.

"The raft was spinning around, and I was unable to control it," Mr. Collins said ". . . I later found out it was because Mr. Madsen was holding onto the side and acting like a kind of anchor. . . . He is a big man, and I don't have a great deal of upper-body strength."

After securing the raft, Mr. Collins was able to help Mr. Madsen. He immediately saw that Mr. Madsen seemed to be suffering from hypothermia.

"He was shivering uncontrollably. . . . so I took off my life jacket and took off his life jacket and took off my shirt and took off his shirt and cut away . . . the hood of his windbreaker. And then I embraced him on the shore—with, you know, naked torsos—and after just a few minutes, he started to get warm and I started to get cold, so it had worked."

The two then crawled up a 200-foot bank and walked along the river for more than 2 hours before being spotted by a helicopter.

In other testimony last week, Les Bechdel, an Idaho river guide and author of a book on river safety, said Mr. Thompson failed to exercise even minimal whitewater industry safety standards for the major stretch of rapids.

Mr. Bechdel said those on the trip should have received extensive emergency safety instructions, worn wet suits and perhaps helmets, and been on several rafts instead of one.

Instead, he said, the outfitter used one raft and apparently gave few safety instructions and didn't properly check life jackets. Mr. Bechdel said proper instructions would have assured Mr. Fasules' life jacket had remained in proper position and let Mr. Collins know there were ways to pull him into the raft without lifting him.

Also killed in the accident were Richard O'Reilly, national director, Media-Advertising Partnership for a Drug-Free America; and two DDB Needham senior VPs, Stuart Sharpe and Gene Yovetich. □

# Thatcher exit may boost ads

**By Sean Kelly**

LONDON—Advertising executives and analysts here were cautiously optimistic about the future of the U.K. ad industry after the decision last week of Prime Minister Margaret Thatcher to resign.

Mrs. Thatcher's three election victories during her 11 years in office were engineered by Saatchi & Saatchi Co., which became famous for the high-profile account. Saatchi resigned the Conservative Party business in 1987 after her final victory.

A Saatchi official who didn't want to be identified declined to predict whether Saatchi would work again for the Conservatives.

"At this point, we just couldn't say," the official said. "We may or may not be on a pitch list. It's one of those things you don't necessarily know beforehand."

Advertising executives generally said they weren't overly concerned about which of the three candidates becomes the next prime minister. The contenders are Chancellor of the Exchequer John Major, Foreign Secretary Douglas Hurd and Michael Heseltine, the former defense minister who mounted the challenge that toppled Mrs. Thatcher.

M. Thatcher

Ad executives said all three are unlikely to make radical changes. They did, however, express concern about how the new prime minister would tackle the current U.K. recession, which is causing ad spending to plunge.

Of the three candidates, Mr. Heseltine has the closest connection to the ad industry. He's a major shareholder in Haymarket Publishing Group, which owns U.K. advertising trade magazine *Campaign*. Mr. Heseltine and Saatchi Chairman Maurice Saatchi worked together 20 years ago when Mr. Saatchi had his first job in project development at Haymarket.

"Advertising agencies will be looking to the new prime minister to get the economy back on course," said Adrian Birchall, vice chairman of D'Arcy Masius Benton & Bowles. "If the interest rates come down, mortgage rates come down and consumer spending will increase. That's one of the two main factors that affect advertising budgets."

Mr. Birchall said the new government will probably continue Mrs. Thatcher's policy of large government ad budgets.

Mrs. Thatcher will leave office this week after a new prime minister is chosen by the 372 members of Parliament belonging to the Conservative Party. The Conservatives don't have to call an immediate general election but must do so within the next 18 months. They will be challenged by the opposition Labor Party, and it can be expected that both parties will break major ad campaigns. Neither has an official ad agency of record. □

# McD's beats politics

**By Kate Fitzgerald**

McDonald's Corp. won first place in last month's survey of advertising awareness, thanks to its "McMillions on NBC" contest promotion with NBC.

For the second consecutive month, McDonald's was No. 1 among the top 10 best-recalled advertisers in *Advertising Age's* monthly AdWatch survey.

The McDonald's-NBC $35.5 million cash giveaway promotion broke in early October and aired throughout the month, supported by ads for both McDonald's and NBC. TV spots were handled in-house by NBC or by McDonald's agency Leo Burnett USA, Chicago.

AD AGE GALLUP SURVEY

Politics dominated the local ad scene in October, as political ads for the Nov. 6 election ranked second among the top 10.

Automobiles placed third again, proving that escalating oil prices haven't slowed the pace of automobile ads. Chevrolet placed fourth among the top 10, up two slots from the previous survey.

Anheuser-Busch's Budweiser and Bud Light brands tied for fifth place in the survey with Pepsi-Cola, moving up from 10th place in the previous survey. Ford slid to seventh from its fifth place finish in September.

AT&T returned to the top 10 after a three-month hiatus, placing eighth thanks to higher awareness from its "Get it in writing" advertising from N W Ayer, New York. AT&T was among the top 10 from last April through June, due to the launch of its Universal credit card.

Coca-Cola's awareness slipped sharply in the latest survey, to ninth place from second in September, repeating the experience Pepsi-Cola had one month ago. Both cola marketers ended their heaviest ad campaigns of the year on Labor Day, though Diet Coke was advertised through September.

Nike continued to stroll down the charts as its back-to-school advertising tapered off, putting the shoe marketer at the bottom of the top 10. Nike placed fourth in September's survey and was second in August.

In aided awareness, Buick was among the top 5 best-recalled car and truck advertisers for the second time this year, placing fourth. Chevrolet led the category with 21.4%, followed by Ford with 20.8%, Toyota with 8.3%, Buick with 3.8% and Chrysler with 3.6%.

Dr Pepper also resurfaced in aided awareness of soft drink advertisers. Pepsi-Cola led the soft-drink category with 39% awareness, followed by Coca-Cola with 34.2%, Diet Coke with 6.7%, Dr Pepper with 5.1% and 7UP with 1.5%. Dr Pepper was last mentioned in aided awareness of soft drinks in February.

AdWatch is a joint project of *Ad Age* and the Gallup Organization. Advertising awareness is measured by asking a nationally projectable sample to name the first advertising that comes to mind from all seen, heard or read in the previous 30 days. Last month, 1,000 adults were polled by phone. The survey's margin of error is plus or minus 3.1%. □

## AdWatch survey of advertising awareness Top 10 in October

In October, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertising first comes to mind?

| Rank 10/90 | Rank 9/90 | Advertiser | Agency |
|---|---|---|---|
| 1 | 1 | McDonald's | Leo Burnett USA |
| 2 | — | Political ads (general) | Various |
| 3 | 3 | Automobiles (general) | Various |
| 4 | 6* | Chevrolet | Lintas:Campbell-Ewald |
| 5* | 6* | Budweiser/Bud Light | D'Arcy Masius Benton & Bowles/-DDB Needham Worldwide |
| 5* | 10 | Pepsi-Cola | BBDO Worldwide |
| 7 | 5 | Ford | J. Walter Thompson USA |
| 8 | — | AT&T | N W Ayer/Ogilvy & Mather/-Young & Rubicam |
| 9 | 2 | Coke/Coca-Cola | McCann-Erickson Worldwide |
| 10 | 4 | Nike | Wieden & Kennedy |

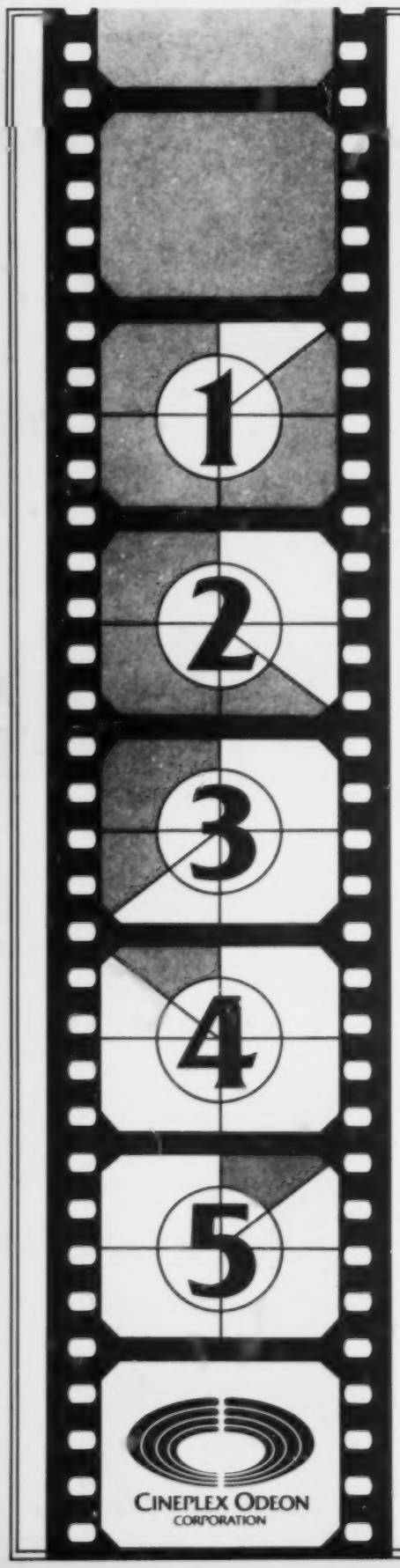
* Indicates tie. Source: Gallup Organization, Lincoln, Neb.

## Danskin taps fitness guru

NEW YORK—Danskin has signed exercise guru Jake Steinfeld as its first male spokesman.

Mr. Steinfeld and his models will wear Danskin bodywear on his ESPN health and fitness show, which starts in January.

Also, Danskin is negotiating with Mr. Steinfeld to license the "Body by Jake" name for exercise clothes that would be supported with ads featuring Mr. Steinfeld. Danskin handles advertising in-house. □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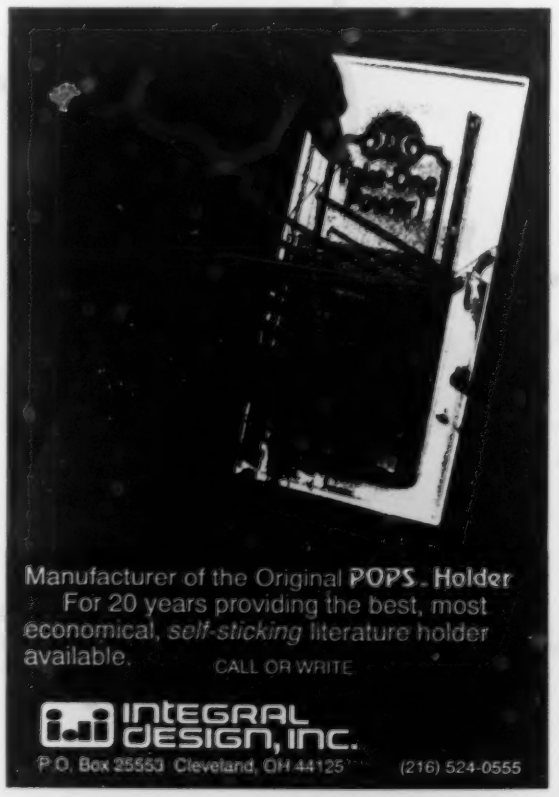

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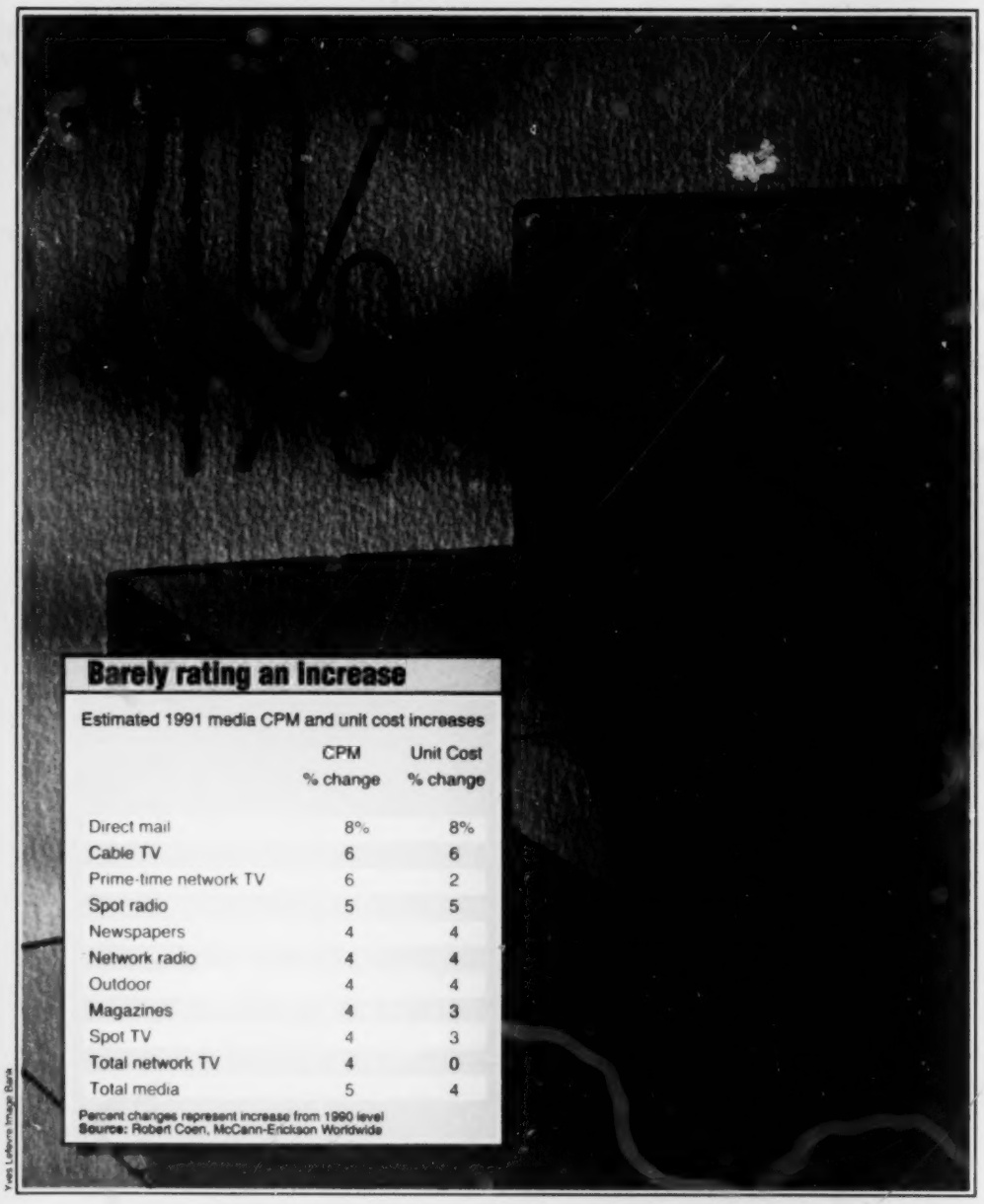
# SPECIAL REPORT

## MEDIA OUTLOOK

Edited by Junu Kim



**Barely rating an increase**

Estimated 1991 media CPM and unit cost increases

| | CPM % change | Unit Cost % change |
|---|---|---|
| Direct mail | 8% | 8% |
| Cable TV | 6 | 6 |
| Prime-time network TV | 6 | 2 |
| Spot radio | 5 | 5 |
| Newspapers | 4 | 4 |
| Network radio | 4 | 4 |
| Outdoor | 4 | 4 |
| Magazines | 4 | 3 |
| Spot TV | 4 | 3 |
| Total network TV | 4 | 0 |
| Total media | 5 | 4 |

Percent changes represent increase from 1990 level
Source: Robert Coen, McCann-Erickson Worldwide

Yves Lefevre Image Bank

# Lid to clamp down hard on media pricing

## Most 1991 media costs won't climb past 4%, Coen says

Media buyers, look at the percentage to the left. Memorize it. Blow it up to poster size and hang it on your wall.

You have just seen your benchmark for 1991 media negotiations.

Media cost maven Robert Coen, senior VP-director of forecasting at McCann-Erickson Worldwide, says cost-per-thousand and unit cost increases for most media will average about 4% in 1991.

Wary of the economic uncertainty, advertisers are holding firm on media price increases—and media are falling in line.

Mr. Coen had predicted 1990 media cost increases would match the Consumer Price Index. Following the Middle East crisis, increasingly pessimistic economic indicators and the soft ad market, Mr. Coen now says final 1990 unit cost increases will lag behind the index.

And he's not too gung-ho on 1991. "Now we are even less optimistic about the outlook for improving ad demand. The lid on media price rises will be screwed down even tighter, and in 1991 media price hikes are expected to lag behind inflation," he says.

This year, the CPM increases for network and spot radio, outdoor and direct mail all fell below inflation. In 1991, Mr. Coen predicts the CPMs of only two media—direct mail and cable TV—will top the expected 5% inflation rate.

Direct mail, about to be bludgeoned by an impending postal rate increase, is the most notable exception at 8%.

Cable, which exacted stunning increases in recent years of 12% to 15%, will see unit cost and CPM increases tumble to a more comparable 6%.

The big loser in 1991 is network TV, which commanded the greatest CPM increase of all media in 1990 at 8% for all TV and 9% for prime time.

An anticipated prime-time CPM increase of 6% is explained more as a result of audience drops than cost increases. Prime-time unit costs are increasing only 2%.

In the worst showing by a medium since network radio's unit costs dropped 2% in 1988, Mr. Coen predicts network TV will be the only medium that won't be able to sell buyers on a cost increase next year. □

# TV buyers go gunning for guarantees

## Upfront placements in jeopardy if Big 3 fool with buyers' rules

**By Wayne Walley**

A potential clash between advertisers and the Big 3 networks over ratings guarantees could jeopardize next year's upfront buying season.

Many believe if the Big 3 again insist on including an alternative viewer-counting method in their ratings guarantees, the TV marketplace and the relationship between buyers and sellers will change dramatically.

"The whole question of buying upfront next year has to be seriously considered," says Allen Banks, exec VP-media director, Saatchi & Saatchi Advertising, New York.

"You commit when you know you will get what you expect. Then it makes sense to advertise upfront," he says. "If guarantees are less than solid and the networks deal with you differently, then the ways business operates have to change, and they are changing."

ABC, CBS and NBC insisted on implementing a controversial viewer-counting formula as part of upfront deals last summer.

This plan would ease network responsibility to provide advertisers with make-goods—free ad time to compensate for shows that don't deliver a promised rating—if TV usage levels reported by Nielsen Media Research inexplicably drop again this year.

Recent Nielsen numbers reveal a continued loss of network viewership. In September, the Big 3 captured 62% of the prime-time audience, compared with 65% the previous September. Late-night network audiences declined even more, from 56% to 51%.

Larry Hoffner, exec VP-sales for NBC, says the NBC-devised formula was merely a self-defense mechanism to protect the networks against potential irregularities in Nielsen's figures.

"We did this with mixed emotions," Mr. Hoffner says. "We hope to see the whole year come through without any glitches or stuff that's unexplainable in the numbers reported by Nielsen. We are all hoping to get back to doing business as usual."

Those in the buying community expect the networks to push for more ratings guarantee concessions during next year's upfront selling season.

"Compromising guarantees is a long-term network goal," says Gene DeWitt, president of DeWitt Media, New York. "The networks will keep working at it. They will

*(Continued on Page S-2)*

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